Organizing Institute

Teaching Fellow Guide

AFL-CIO

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A true organizer is not the one with the most followers

but one who creates the most leaders.

AFL-CIO ORGANIZING INSTITUTE

TEACHING FELLOWS TRAINING GUIDE

Congratulations on being selected as an **Organizing Institute 3-day Teaching Fellow!** You are joining the hundreds of senior organizers who have made a commitment to building the labor movement by training and inspiring a new generation of organizers.

Your role at the 3-day training is to teach organizing basics, to assess the potential organizing skills of the participants, and to motivate and inspire the trainees to organize the unorganized. After spending a short, but intense weekend getting to know the participants, you will be asked to recommend appropriate next steps for their development as organizers.

The goal of the weekend training is to create a community of organizers—seasoned and green, volunteer and paid—who share a sense of mission and a set of principles of how to win at organizing and build power for working people. While hard decisions are also made, the training itself can be an uplifting and important experience for all involved.

As teaching fellows you are the real world teachers. Your stories, strategies and experiences will bring life to the training for participants. We ask you to participate fully in the weekend, including the evening social hours and meals. Also, we expect all teaching fellows to respect the OI's training program and other affiliate unions by not offering jobs to participants off the three-day. If your union is interested in having a certain participant train with you in the field portion of our program, let the OI staff at the three-day know. We will try to accommodate your request.

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Friday Agenda

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10:10-10:20	Break		
10:20-11:00	Group Evaluation		
11:00-11:30	Diplomas		
11:30	Adjourn		
12:00-2:00	Exit Interviews		

House Visit Agenda

1. Get in the Door

"Hello. My name is _____. I am with the _____ workers union. We were contacted by some of your coworkers about some concerns people were having at your workplace. I wanted to come by and talk with you and hear your opinions about these issues. How long have you worked at _____?"

2. Get the Story

Ask fact-based, detailed questions. Ask questions that allow worker to talk about their issues at work.

Transition to Vision: "What happens when you and your co-workers bring *(their specific problem)* to management? Or "Do you know how *(their specific problem)* might be different if you all organized a union?"

3. Give a Vision of the Union

Transition to Inoculation: "What do you think your boss/employer will do when you and your co-workers start to organize a union?" and "Why do you think your boss/employer will fight against your organizing a union?"

4. Inoculation

5. Assess & Agitate

Assessment Question: "Are you ready to stand with you co-workers to work to form a union?"

6. Move to Action

Organizing Institute 3-Day Training
Evaluation & Recommendation of Participants

PURPOSE: The purpose of evaluating participants in the Teaching Fellow meetings is to recommend appropriate next steps for each participant. The recommendations are based on Teaching Fellow observations of and interactions with participants in workshops, role-plays, exercises and informational discussions.

Recommendation/Evaluation Criteria:

Motivation & Ability to Learn

- communicates enthusiasm for the goals of union organizing
- demonstrates a willingness to work long and irregular hours
- demonstrates commitment to social and economic justice
- takes direction and suggestions easily
- evaluates own work and incorporates TF feedback

Interpersonal & Teamwork Skills

- starts and moves conversation with ease
- listens to and empathizes with others
- asks probing questions in one-on-one role plays
- relates well to people different from self
- moves a one-on-one agenda in a focused and flexible manner
- participates in group with relevant ideas and questions
- respects others' time
- respectful of workers

Ability to Lead & Move Workers to Action

- confident and credible
- creates a sense of urgency around need for action
- challenges others to take action
- succeeds in moving others to take action
- leads group meeting with focus and inspiration
- develops ownership of the union by workers

Knowledge of Unions and Ability to explain the Union

- asks thoughtful, relevant questions about organizing
- explains the role of organizer accurately
- explains how unions work in understandable terms
- describes the union as the workers (not as a third party)

RATINGS AND RECOMMENDATIONS

1 = strong is all four areas of the criteria
2 = some strengths and weaknesses in four areas
3 = more weaknesses than strengths in four areas

Recommendations:

1 - People rated "1" can be recommended for the following:

- to be offered to go into the OI's internship and apprenticeship program
- to be developed on a fast track as an organizer with their union

2 - People rated "2" can be recommended for the following:

- to be developed as an organizer through salting a non-union workplace or project work
- to be developed as an organizer through Union Summer
- to be developed on a slower or volunteer basis as an organizer with their union

3 - People rated "3" can be recommended for the following:

- to contribute to the labor movement through research or labor support
- to contribute to the labor movement through politics or Street Heat

Note: the following are not used as evaluation criteria and Teaching Fellows should not comment from on these areas: sexual orientation; race or ethnic background; jewelry or body piercing; gender; age; dress; hair; accent.

ORGANIZING INSTITUTE FIELD TRAINING & PLACEMENT PROGRAM

Next Steps for Participants

PURPOSE: The purpose of the OI Field Training Program is to further train participants on actual campaigns and to place them with unions that are hiring organizers. After the 3Day those recommended go on to a 14-day training for new organizers on campaigns where there is intensive one-on-one work with non-union workers. After the 14 Day training, the next step is a 3month apprenticeship that leads to a job.

1. If you are interested in placing or hiring an unsponsored participant from this training or other trainings, please call the OI Field Training Director who places those recommended for field training. The OI will work with you on a training plan for each person you are interested in hiring.

2. If you want to train your own members who are recommended in an OI internship, call for upcoming training sites or to discuss a 14 day training in your own campaign with a mix of your members and OI trainees.

3. Set up your own field training program for members in your union. The best organizing and learning goes on when members are involved in actual campaigns. Training materials are available from the OI for use in your campaigns.

Please do not recruit unsponsored participants or participants from another union directly at or from a 3Day. We will work with you to place participants who you have a special interest in and who will be an asset to your union.

WHAT WE ARE TEACHING THIS WEEKEND

- **Union Organizing is about One-on-One Communication** – the most effective way to communicate is talking to workers face-to-face. This involves visiting workers in their homes or at their work-site and building a relationship with them. We will spend a majority of the time on one-on-one communication at this training.

- **Union Organizing is about taking action- the workers must demonstrate that they are the Union.** To win workers must be active and take on many tasks to move the campaign and form a union. There must be a representative committee that is willing to take action around issues that help build and maintain majority worker support. The union is not a "3rd" party.

- **Union Organizing is about Having a Strategy and Plan!** Workers will fight if they know and are involved in the plan to win. Every campaign must start with a plan that the workers understand and are part of. We must prepare the workers and the committee for the employers' campaign and how employers use their power to stop workers from winning.

WHAT WE ARE TESTING

1. **Motivation and the ability to learn** - the ability to sustain the hours and demands of the job; the ability to inspire and motivate others; the ability to take feedback and incorporate it into their work; the ability to self-critique.

2. **Interpersonal and Teamwork Skills** - the ability to relate to people from a variety of backgrounds and experience; able to be engaging, direct, confident; able to listen and empathize.

3. **Ability to Lead and Move Workers to Action** - the ability to establish credibility and gain the respect of others, inspire confidence, recognize leadership in others; ability to agitate, challenge and move workers to action.

4. **Knowledge of Unions and Ability to Explain the Union** - the ability to ask thoughtful, relevant questions; understanding the role of unions in the workplace; able to explain the role of the organizer in forming unions.

TEACHING TECHNIQUES

LECTURES

1. **Organize to cover a few main points.** Follow the outline provided or use your own, but don't try to overload the participants with too much information.

2. **Repetition of key points.** Review the main points at the beginning and summarize at the end.

3. **Ask questions and call on people.** Encourage participation by asking questions. Be sure to call on people who do not readily volunteer. When one or two people dominate the conversation, others get turned off to what you are teaching.

4. **Draw on your experience—tell stories.** Illustrating your points by telling stories is very effective. You gain credibility and the work is better understood if you base your conclusions and points on experience.

5. **Use the Flip-chart!** Don't sit behind a table or read from notes. Put up key points on the board, make eye contact, etc.

ROLE PLAYS IN SMALL GROUPS

1. **Introductions and setting the scenario.** When you first get to the small group, introduce yourself and write down everyone's name. Set the scenario clearly and explain the objective of the role play.

2. **Let people succeed.** The object is to teach, not to trip people up. If the participant answers the question well or gets in the door, end the role play and move on.

3. **Don't encourage breaking the role play.** Apprehensive participants may try to avoid the role play by asking your opinions. Save your advice to the end. Encourage participants to stay in role plays.

4. **Ask people to critique themselves first.** In longer role plays, like the ones Saturday, before asking others or commenting yourself, have the "organizer" critique him or herself.

5. **Give constructive feedback.** Even when people do not perform as you would like, give helpful, supportive feedback.

6. **Summarize before moving on.** Leave the group with a sound piece of advice about communicating with workers one on one.

GIVING FEEDBACK TO THE PARTICIPANTS

One of the responsibilities of the teaching fellows is to give feedback to the participants during the weekend. Feedback to the participants should be given at different times during the weekend; in a group setting like the role plays and one on one during breaks or meals. There are several objectives to giving feedback. Feedback can be use to either reinforce good behavior or correct behavior that needs to change. The following is a guideline for giving feedback during the 3 day:

POSITIVE FEEDBACK:

- ***Be specific:*** "Your answer to the worker's strike question was great, you weren't defensive" is more helpful than: "You did a good job in the role play."
- ***Take note of the special effort:*** notice the small things, not just the big. Even though it may seem small, make sure to give the positive feedback on the eye contact.
- ***Don't overpraise:*** insincere or ill-informed flattery won't develop the person.

CORRECTIVE FEEDBACK:

- ***Be specific:*** during the 3 day, giving a participant exactly what he/she may need to develop is much better than being vague
- ***Give feedback as soon as possible:*** after the role-plays and during breaks times when more time is needed.
- ***Don't make it personal:*** For example: "You are not good at listening" will make the participant defensive. What may work better is: "During the role play, do you think you got into the issues? What I would suggest to improve the skill of listening is..."
- ***Offer solutions/suggestions:*** when giving feedback, the TF should use his/her own experience as possible solutions/suggestions. For example, "Sometimes when a worker asks me about dues, I talk about how the dues are used for trainings, servicing etc. to make the union stronger..."
- ***Ask questions to check for understanding:*** when giving corrective feedback, ask the participant what he/she thinks and, after giving the feedback, check for understanding.
- ***Be Honest:*** if a participant seems to not be getting a certain aspect of the training etc. the time to talk to him/her is <u>during</u> the 3-day. If the participant is not recommended, the feedback that he/she is not a good listener will NOT be helpful in the exit interview.

WELCOME - STARTING THE TRAINING **FRIDAY 11:00 - 12:00**

OI STAFF: _____

PURPOSE: To welcome the group, give information and make announcements.
STRUCTURE: The whole group is around the u-shaped table.

OUTLINE:

1. Welcome to the AFL-CIO Organizing Institute Three Day Training!
2. Who's in the room – Participants sponsored by their union, unsponsored, and teaching fellows

Participants:

a. **Union members and leaders who are sponsored by their union**: ask who is here from UAW? SEIU? AFSCME? CWA? Have members stand up and be recognized.

b. **Those of you who are not currently in a union** who want to use your talents and energy to help fight for workers' rights and organize - some of you are community or student activists and we especially welcome you. We cannot win unless more people take on our fight and the only way to get union jobs today is to go out and organize.

Organizers - Teaching Fellows:

c. We thank the organizers around the room from different internationals and locals for taking the time from their campaigns to help lead the training this weekend.

We'll all get to know each other very well and we'll do introductions in just a minute.

3. **Why we are here:**

We have talked about who is in the room today. Some come from unions, others are students or community leaders.

Regardless of how we got here, we share a common thread. We all feel that workers have the right to organize a union; they have the right to makes changes in their workplace in order to support their families and improve their lives. We all want to be a part of empowering an unorganized workforce in order for them to stand up to their boss and demand change.

4. **What to expect this weekend**

This weekend will be very intense. We will teach you some of the basics of union organizing and have you practice the skills needed by doing a lot of role-plays. The training is both an educative and evaluative process.

For those of you who are union members, we will be sending your union a written assessment of what we observed this weekend in terms of the skills of a union organizer. For those of you who are un-sponsored, the OI staff will have face-to-face exit interviews with you on SUNDAY after 12 noon. We will give you the schedule on Sunday.

5. **Other announcements:**

- Have the Logistics person stand up. He/She is in charge of room reservations. Everyone is in a double room and changes will only be made if we have a male/female or smoker/non-smoker in the same room. If you haven't checked in, don't worry. Your room will be held and you can check in at dinner time tonight.

- If you are not staying at the hotel, please talk with the logistics person about meal tickets (if applicable)

- We'll have social hour tonight and we need volunteers to help us get sodas and beer, etc.

- Get names of volunteers who will "pass the hat" at lunch

- Smoking is in the following areas of the hotel (not in training rooms):_____.

- Have a great time and we'll start with introductions.

INTRODUCTION OF PARTICIPANTS **FRIDAY 11:00 - 12:00**

OI STAFF & TF:_____

PURPOSE: To get people participating and cut the tension; to learn about people quickly; to give the participants and the teaching fellows a sense of who's in the room.

STRUCTURE: Trainees sit around a U shaped table. Teaching Fellows space themselves out around the outside wall. One TF leads the group by asking the participants to form groups of four where they sit and select a report-back person. The groups discuss the questions below for ten minutes.

OUTLINE: Each small group must answer the following questions:

1. What are four things your group has in common?
2. What is one thing that is unique about each person in the group?

The TF then asks the participants to return to the whole group.

1. The report-back person says what the things are in common
2. Each person introduces him or herself and says what makes them unique. When introducing themselves they should cover the following:

Their name, where they're from, their job—if any and their union/organization background.

Then the Teaching Fellows should briefly introduce themselves. Say where you're from, what union you're with, how long you've been there and how you got into the labor movement.

The TF leading the discussion should keep track of time, ask people follow-up questions if time allows and move the discussion if time is short.

Depending on the number of people in attendance, each person may have 1-2 minutes to introduce themselves.

OPENING REMARKS **FRIDAY 12:00 12:15**

OI STAFF or GUEST_____

PURPOSE: To lay out the broader vision and mission of organizers and the labor movement against the backdrop of the changing economy and employer opposition to unions.

STRUCTURE: Brief remarks to the group by OI staff or guest speaker.

REMARKS: (may be changed at discretion of speaker)

1. **OUR COUNTRY IS IN A CRISIS. The decline in organized labor - from 35% in the 1950's to less than 14% now and under 10% in the private sector - directly relates to the increasing decline in our rights, our living standards, and our communities.**
    - 20% of full-time workers earn poverty level wages, including 50% of all African-American workers and 2/3 Latino workers.
    - The majority of new jobs created by this "booming" economy are part-time and/or have no benefits. The boom is built on sweat shops.
    - Currently - 45 million people in the U.S. don't have health insurance.
    - Wages of CEO's have risen from 41 times to 217 times that of the average worker. Nearly 150 billionaires have been created in the last 20 years.
    - We can't get good union contracts with 90% of the private sector non-union.

The HUGE and GROWING GAP between the rich and poor is directly related to labor's decline.

2. **THE BATTLEGROUND IS "THE RIGHT TO ORGANIZE"**

Employers are waging war on their workers to keep them from organizing. We in labor, and our allies, must make the Fight for Workers' Rights to Organize the new Civil Rights Movement.

- When workers begin to organize, employers are increasingly vicious and retaliatory:
- In 1 out of every 4 organizing campaigns, employers outright fire leaders of the campaign.
- 50% of all employers threaten to shut down.
- 80% hire high-priced "union busters."
- If workers win an election or recognition, 50% of the employers never sign a contract.
- We must build a Workers' Rights Movement, with our allies, to fight employer abuses.
    - Workers organized in the greatest numbers, before there were laws, through mass actions and connecting the labor struggle to a social movement.
    - 5 million workers organized in 3 years in the 1930's, at the peak of the "Great Depression" when there were no rights.
    - Public Sector workers began a wave of organizing in the 1960's that connected with the Civil Rights Movement (AFSCME's 1968 Memphis Garbage Workers Strike).
    - Farmworkers combined worker organizing and a national consumer boycott to win the first contracts in agriculture.

3. **BUILDING A STRONG UNION MOVEMENT IS OUR BEST HOPE TO TURN THIS COUNTRY AROUND**

- We have the moral authority to take on corporate greed and injustice.
- We have the members and the vision.
- We have the resources - billions of dollars.

4. **DO WE HAVE THE WILL?**

- Unions must change to meet the challenge.
- Unions now spend 5% or less on organizing. We cannot organize the 85% of the workforce that's non-union with 5% of the resources. We must commit resources to organizing - the challenge is 30%.
- Unions are only strong when their members are active. We must involve our members to support organizing.
- We must hire and train talented and committed organizers, both from the ranks and from the community.
- We must have a greater vision and a strategy of action to win.
- Unions must include and welcome all workers.
- We must fight racism, sexism, homophobia and anti-immigration sentiment.
- We must involve and attract young people.
- We must work with our allies and build coalitions that support workers' struggles.

5. **ADD THE FOCUS FOR THE AREA/CITY WHERE THE TRAINING IS HELD.**

6. **THE RESPONSIBILITY IS OURS.**

- We are part of a working class struggle in this country.
- We can all make a great difference to advance an organizing agenda in our unions and our communities.
- Movements were built as Rosa Parks sat down on the bus and refused to move; as students and young activists sat down at segregated lunch counters; as Filipino and Mexican farmworkers demanded drinking water and toilets in the grape fields of California.
- Workers today have and are putting their jobs on the line. We must dramatically increase the numbers - 300,000 workers need to successfully organize each year to stay even and 1 million organize to grow by 1% - through having good plans and strategies, more resources and skilled organizers and building strong worker organizing committees.

THE PRINCIPLES OF UNION ORGANIZING **Friday 1:30-2:00**

OI STAFF: _____

Purpose: To present an overview of the basic principles of union organizing and the union organizer.

I. What does it mean to organize a union?

Let's start off discussing why workers would want to organize in the first place.

What are some problems that workers in general face on the job?
(Solicit answers from the group and write answers on the flipchart)

- **Discrimination**
- **Lack of respect**
- **Low wages**
- **Little to no benefits**
- **Lack of seniority rights**
- **Bad treatment by supervisor**
- **Short staffing**
- **No voice in decision-making**
- **Unsafe working conditions**

What are some alternatives that workers have to solve these problems?

- **Go to their supervisor to see if it can be resolved**
- **Complain about it**
- **Go to a government agency to file a charge (in cases of discrimination)**
- **Quit**

What are the problems with these alternatives?

- **Supervisor does not have to listen to the worker**
- **Improvement may be short lived**
- **It may take years for a government agency to investigate**
- **Quitting doesn't solve the problem at that workplace and there is a small likelihood the worker will quickly find a significantly better job elsewhere**

How is forming a union in a workplace different than these alternatives? What does it mean?
(Put this on the Flipchart)

Organizing a union means that workers are standing together and acting collectively to make changes in their workplace. Forming a union means that workers will have the right to sit down with management, raise their concerns, and negotiate a union contract around changes and improvements.

This sounds like a good idea but why is it that only about 28% of the public sector is organized and 9% of the private sector?

What are the obstacles to organizing? **(Solicit answers from the group)**

- **Fear of retaliation from the employer**
- **Lack of education about the Union**
- **Feeling of hopelessness: doubt that things can really change**
- **Workers are often isolated, don't obviously see their common interests with their co-workers**

In spite of these huge obstacles there are unions that have succeeded in helping workers organize in the last 15 years. They have identified some basic principles that are consistent in winning campaigns.

III. The Principles of Union Organizing (Put up on the Flip Chart)

- **Union Organizing is about One-on-One Communication –** the most effective way to communicate is talking to workers face-to-face. This involves visiting workers in their homes or at their work-site and building a relationship with them. We will spend a majority of the time on one-on-one communication at this training.

- **Union Organizing is about taking action- the workers must demonstrate that they are the Union.** To win workers must be active and take on many tasks to move the campaign and form a union. There must be a representative committee that is willing to take action around issues that help build and maintain majority worker support. The union is not a "3rd" party.

- **Union Organizing is about Having a Strategy and Plan!** Workers will fight if they know and are involved in the plan to win. Every campaign must start with a plan that the workers understand and are part of. We must prepare the workers and the committee for the employer's campaign and how employers use their power to stop workers from winning.

The training this weekend will focus on these three principles. Obviously there are other factors that contribute to a successful organizing campaign but for the purposes of this training, we are focusing on the first steps.

Different unions use different methods to organize. We will teach this weekend the model most typically used by unions today. It is in no way the only way workers organize nor is it necesarily the correct way. Every union chooses its own strategy.

IV. What Will You Learn This Weekend?

This weekend we will teach you how to do a house call. If you learn nothing else this weekend we want you to learn how to ask workers questions about their work place, listen to their responses and ask follow up questions. We want you to understand that, ultimately, what we say as organizers means much less than what the workers say.

An Effective Union Organizer (Put up on the flipchart)

1. **Passion and Motivation:** to be an effective organizer, one must have a passion for social and economic change. One must want to do "grass-roots" work. This is not a 9 to 5 job.
2. **Relational Skills:** one must be able to LISTEN to workers, build relationships.
3. **Willing to challenge others:** this job involves being an agitator. An organizer must challenge an individual and groups of workers to take action.
4. **Able to work well in a team/work with people who are different from themselves:** the labor movement is diverse in many ways. As an organizer, you will work with and help organize people who may have different opinions, backgrounds, etc from you. An effective organizer learns from others and respects other's opinions even if they are different.
5. **Willing to take feedback, learn and incorporate the feedback into your work.**

V. Wrap up

These are the things we are going to be looking for from you this weekend. This training is both instructive and evaluative. We will be doing A LOT of role-plays to give you the opportunity to practice the skills of an organizer. You will learn a lot and will also get feedback from the instructors on the different techniques of organizing.

Get the most out of the weekend:

- RESPECT OTHERS: please turn off your cell phones, pagers etc. during the session. Don't interrupt each other
- TALK WITH THE TEACHING FELLOWS! They are here to share their experiences with you. Ask them about their union, their organizing campaigns.
- PARTICIPATE! Ask questions, do the role-plays.

PRINCIPLES OF UNION ORGANIZING - ROLE PLAY FRIDAY 2:05-2:45

PURPOSE: To move participants into small groups. To teach the Principles of Union Organizing through a Role Play. To teach the skills of listening and asking question. To learn to talk about the union as workers united around common goals. To evaluate one-on-one skills.

STRUCTURE: We start out in the whole group to explain the exercise. Then we break down into small groups to role-play. The TF sets the scenario and plays the role of the worker. A participant is chosen to play the role of the organizer. Each one in the group should have the opportunity to be the organizer during the 20 minutes before the TF rotates.

OUTLINE:

Describe the scenario to the whole group. Briefly teach the principles involved in each scenario:

BREAK INTO SMALL GROUPS

TF SET UP:

- When you get to the group, state the purpose of the exercise. "This is an exercise on listening to what a worker is saying."
- If the role play calls for it, assign someone to be the organizer.
- The TF will play the role of the worker.
- Follow directions indicated for each scenario.
- Ask for feedback from the group and give tips after each role play.
- Keep it moving to give everyone a chance.

When you rotate to the next group, find out if anyone did not get to be the organizer, or pick the person who went second last time around. Set the next scenario.

TIPS FOR ROLE PLAYING

1. Write down everyone's name as soon as you sit down
2. Use the scenarios we've suggested, or similar ones on the same theme
3. Note what scenario you set up for whom to jog your memory later
4. Takes short notes to remind yourself of how the participant did
5. Hold your comments for the middle or the end
6. Avoid getting "out of the role play" except for short comments
7. Keep the role plays short to give everyone a chance
8. Remember to teach: give constructive feedback, encouragement
9. Experienced organizers will vary on content between themselves. Focus on principles of organizing and principles of communication

PRINCIPLES OF UNION ORGANIZING – ROLE PLAY #1 **Friday 2:05-2:45**

Participant summary (read aloud to the full group before breakouts): You are an AFSCME organizer visiting a direct care worker at Madeline Gardens Home for the Developmentally Disabled. The facility has 500 employees. The employees work in 70 different group homes and living centers throughout the Chicago area. Each group home or living center cares for between 5 and 10 residents.

Employer: Madeline Gardens Home for the Developmentally Disabled.

Union: American Federation of State, County, and Municipal Employees.

About the job: Employees serve all of the needs of developmentally disabled residents. Case managers oversee the money, buy groceries for the house and keep the house clean. Job Coaches find work for residents and drive the residents to their jobs. Training Counselors teach classes on life skills. There are a few LPNs who work in the intensive care facilities.

THEME ONE - ORGANIZING IS ABOUT LISTENING **Friday 3:00-3:30**

Teaching Point: We learn about workers and work places by listening. Listen to the following explanation by a Madeline Garden worker. Afterwards, participants take turns answering the questions asked by the Teaching Fellow.

Worker (Read Aloud to Group):

I've worked at the Madeline Gardens facility during the last two years and I really enjoy the work. But, there are really two problems, they don't pay us enough and they have been cutting back on staff. It used to be that there was a C.N.A. nurse for every house. Even if they weren't there all of the time at least they would come in almost every day. But, they don't want to pay for nurses any more so now a lot of that responsibility falls on us.

When I first started, case managers weren't allowed to pass meds but now they want us to give medications. The training we had for passing meds was totally inadequate and then they blame us if anything goes wrong with the meds. For instance, I had this client the other day who was really tired and wanted to sleep all day and they blamed me insinuating that I had given him too much of his meds.

Every year we are supposed to get a review and then at the review they give us our yearly raise. The raise is based on the evaluation at the review. Usually they say we can get up to 30 cents per hour increase but I have never heard of anyone getting more than 25 cents. So first off, I was supposed to have a review last year after one year of work and they kept putting it off and putting it off. In the end the review was three months late and then I only got a 15-cent raise. Then I asked if they would make it retroactive since I was suppose to get the review after a year.

My own supervisor is Melvin Samuels. Mr. Samuels told me he wasn't in charge of payroll and that I should talk to the payroll department. After a bunch of phone calls to payroll they told me that my yearly review was not guaranteed and that because of the computer program that they use they are unable to pay retroactive. So basically I got ripped off on that one.

The best thing about working here is the residents. The employees here pull together to make their lives better. My coworkers are Malcolm Xavier, Tracey Allen and this new guy named Tommie and we all get along real well. Each resident is really an individual and some of them have great personalities. I have also seen residents make real improvements once they come and stay with us. Over my two years at the house, I have seen residents come in a learn how to fix basic meals, learn to make their beds and even get jobs and work. It makes them feel better about themselves when they can accomplish things like that. It makes me feel like my job is worth it when I see them improving like that.

Questions

- What are the two biggest problems at work identified by the worker?
- How often were C.N.A. nurses at the houses in the past?
- How often are they there now?
- What does "passing meds" mean?
- Why did the worker get in trouble when the resident wanted to sleep all day?
- How often do they get reviews?
- What is the highest possible raise according to management?
- What is the highest raise the worker has ever seen?
- What was the worker's last raise?
- How late was the worker's review?
- What is the name of the employee's supervisor?
- Why didn't they give the worker retroactive pay?
- What are the names of the employee's co-workers?
- Which co-worker was recently hired?
- What does the worker like about his job?
- Why is it important to remember all of these details? *(usually organizers don't take notes during a house calls. These details are important for know about other workers and their attitudes about the job.)*

Organizers:

_____

_____

_____

_____

THEME TWO – **Friday 3:00 – 3:30**
ORGANIZING IS ABOUT ONE ON ONE COMMUNICATION

Teaching point: Organizers build trust quickly with workers they have never met before by listening to them, respecting their opinions and experiences, and showing an interest in who they are and what they think. The purpose of this role-play is to practice the skill of asking fact based question and then asking follow up questions on the same topic.

The Teaching Fellow will play the role of a worker at the Madeline Gardens Home for the Developmentally Disabled Each participant will get a chance to ask the worker questions in an area of the worker's work life.

Teaching fellow: prompt each participant to ask questions in one of the following areas:

Prompt and responses for each participant:

1. **Find out as much as you can about the worker's current job and how it's done**
   - Direct Care Worker for two years.
   - Take care of developmentally disable residents; fix meals, bath and drive them to their jobs.
   - Works 3 p.m. to 11 p.m. Schedule changes so that every other weekend is off.
   - Sometimes have to restrain residents who get violent.
   - Only 4 other co-workers work in their house and doesn't know other workers.
   - Committed to resident care. Does the job not just for the pay.

2. **Find out as much as you can about what the wages and benefits**
   - Makes $8 an hour.
   - Recently received .20 cents raise out of a possible .30 cents after a review.
   - Was suppose to get evaluation after 1 year but didn't get it until 1 ½ years.
   - Health insurance costs $270 per month for family and $50 for individual.
   - Children are on state funded insurance for low-income people.
   - Doesn't take the health insurance because it is too expensive.
   - One week of paid vacation per year.
   - Three paid sick days per year.

3. **Find out as much as you can about the worker's co-workers**
   - Only one other co-worker has been there longer. Two started last month.
   - Has to spend a lot of time training new employees because of high turn over.
   - Doesn't spend his free time with his co-workers.
   - Meets co-workers from other houses at monthly staff meetings.
   - There are two part time employees who occasionally get called in when they are short staffed.
   - Co-workers often complain about the wages but don't ever talk back to management at monthly meetings.

4. **Find out as much as you can about the worker's supervisors**
   - The House supervisor has worked there five years and used to be a Case Manager
   - House supervisor is friendly and goes out of her way to help them with work.
   - Supervisors at Main Office put pressure on house supervisor to cut back on staff hours.
   - House supervisor is caught between caring for residents and the main office where they just want to make money.

- Only meets Main Office supervisors at monthly staff meetings.

Organizers:

_____

_____

_____

_____

THEME THREE - **Friday 3:30 – 4:40**
ORGANIZING IS ABOUT WORKER INVOLVEMENT

Teaching point: Workers must actively organize their unions in order to win union elections and improvement in their wages and working conditions. The Union is not a "3rd party". The union is the workers organized to demand improvements.

In the following role-play, listen carefully to the worker's questions about organizing. Answer them by insisting that the only way to organize a union and win real improvement in wages and benefits is if the workers are actively involved in the organizing campaign.

Question from the worker (Teaching Fellow):

1. I'm for the union, but I don't want to get involved. Is that okay?
2. If I am going to pay union dues, how much can you guarantee that I will get for a raise?
3. I told my supervisor that I would vote "No" but I am secretly for the union. Don't worry about me.
4. My co-worker, Maureen, has been here ten years. You should talk with her about organizing the union.
5. I'm not sure if my co-workers will support this. I just want to wait and see what happens.

Organizers:

_____

_____

_____

_____

ONE-ON-ONE COMMUNICATION: **FRIDAY 3:00- 3:30**
GET IN THE DOOR / GET THE STORY
DISCUSSION LED BY TF: _____

One on One Communication: Get the Story

Purpose: To give participants an introduction to the principles of one on one communication and demonstrate a "role play" to prepare people for the next session.

Structure: If the group is over 35 participants, it may be broken down into two groups at this point. Otherwise, the group stays seated around the table. One TF leads the discussion. A second TF called on to assist in a role-play.

Outline: TF asks the participants questions to get the discussion going.

I. **This weekend we will teach you how to do a house call**. A house call is a conversation between the union organizer and a worker that usually occurs in the workers home. It is the cornerstone of most union organizing work. It is what organizers spend most of their time doing

II. **What are we trying to accomplish in a one on one discussion with a worker in their home or workplace?** Make sure the list includes: building a relationship, find out problems workers are facing, educate about the union, prepare them for the bosses campaign, help the worker analyze the source of their work place problems, and move workers to action.

III. **Three things the worker should understand at the end of the house call**:

- ✓ They cannot change things at work on their own; they need their co-workers.
- ✓ The Union is the only possible vehicle for change.
- ✓ They will have to do a lot of work in order to organize their union.

IV. **How do we accomplish all of this? We have a plan for the conversation**! This is the conversation that we will teach you this weekend. Every union uses some variation of this house call plan.

(write on the flip chart)

a. **Get in the Door**
b. **Get the Story**
c. **Give a Vision of the Campaign and the Union**
d. **Inoculate against Employer Campaign**
e. **Assess and Agitate**
f. **Move to Action**

1. Get In the Door

a. **Say who you are:** "Hello. My name is _____. I am with the _____ workers union. We were contacted by some of your coworkers about some concerns people were having at your workplace. I wanted to come by and talk with you and hear your opinions about these issues. How long have you worked at _____?"

b. **Stress the importance of our conversation:** Ask them if you can come in and talk with them about their work place. Do not tell them that it will "just take a minute" because is won't. We want them to understand that we are here to have an important conversation with them.

c. **If they say No or hesitate:** If a worker does not invite you in, it is not helpful to get in a discussion about whether they should invite you into their house. Just move on to you first question: "How long have you worked there?" Get the conversation going they will invite you in later.

d. **Things to think about:** Why do we want to get inside? Will workers let you in? What will help you get in the door? Why might workers not let you in? body language, being clear, being friendly, showing your interest in them, asking if you can come in.

- The Win Rate is 78% in cases where organizers house call between 60-70% of the workforce.
- The Win Rate is 41% if the organizers do no home visits.

Ask a dozen or so of the participants stand up and say their introduction like in letter A above.

2. Get the Story

Ask questions in order to understand the history of problems the worker has had at their job. Along the way we are building a relationship with the worker. By the end of the conversation we want to know what problems the worker is facing at work and what she would like to see changed.

a. How do we find out what problems at work would inspire the worker to get involved in the union campaign? Ask specific, fact-based questions about their work life.

Ask fact-based questions. A good first question is: "How long have you worked there?" Then find out their department and job title, how their machine or equipment works, who they work with, who is their supervisor, what are their wages and benefits, what changes they have seen over the years and so on.

Do not ask vague or opinion questions such as: "Are you satisfied with your wages or health care?" or "Are there things you want to see changed?" Do not ask vague questions like "What kind of issues do you have with your company?" or "So, what is going on at work?" Don't try to fix the problems they bring up, we need to here all the problems first before we start talking about the union.

Our questions should be pointed. We are not asking just any questions. We want to get the story of the problems the worker has faced on their job. We want the worker to relive their bad work experience through telling us about them. They should upset or agitate themselves through the retelling of these stories.

b. How do we get the entire story? Listen and ask follow up questions.

It is important to ask follow up questions, to probe issues important workers. Each worker is unique and we must understand what is important to them. Most people will not give full answers unless they are asked several follow up questions. Workers may be resistant to tell us important or personal information or to complain about their lives.

For every issue a worker raises, the organizer should be able to ask several more follow up questions. For instance, if a worker tells you that they don't like the health care insurance ask them "Why not?". What experiences have they had trying to use the health care insurance? Is it a lack of doctors or problems getting bills paid or lack of areas covered? Who in their family has been affected by this? How much do they pay monthly and for co-pays?

Don't assume you understand. If in doubt, ask. Get the whole story.

c. What can workers learn by telling us about the problems they are facing at work? It is important for workers to understand how to identify and analyze their work problems as the result of the balance of power between the workers and the bosses .

Why is this important? Learning to analyze their work place in terms of the balance of power between workers and bosses will solidify their support for the union and for their co-workers. It helps workers to understand why the bosses fight the union (to protect their profits and to control the workplace). It will help them interpret future work place problems and the actions of the bosses. It will help them to talk with more authority with their co-workers about their common problems.

"Who Decides?" questions can help workers see the source of their work problems (and their powerlessness) by focusing on the bosses' ability to make all the important decisions. For instance, "Who decides how raises are given out?" "Who decides how promotions are given out?" These questions encourage the worker to focus on the power of the boss over all aspects of the work place.

"What have you done about it?" Questions. These questions start the conversation about how we change things. "Has anyone ever tried to do anything about changing that?" "What happened?"

IV. Role play with Teaching Fellows

Have another teaching fellow join you to role play first two steps of the house call, Get in the Door, Get the Story, and Find out the Workers Issues. Pick a campaign—tell the group the name of the employer and the union. An initial visit.

1. Getting in the Door

Prep the TF who is playing the worker that they are scared about a union, but also think their job could be greatly improved. Sample things they could say "How did you get my name?" "I'm busy right now." After some initial resistance, they should warm up and let you in. After the role play, ask for a critique of the organizer. What worked, what didn't? Any questions?

2. Get the Story/Getting the Worker to Talk

Prep the TF to be a different worker, this time they are not scared, but they don't know much about unions. The worker should not be real talkative at first. After you get them talking about their job and conditions at work, the worker should give you some leads on issues (unfair workload, safety problems) that you ask them more about. Don't start talking about what the union can do. Agitate. After the role play, ask for feedback from the participants.

Summarize: As an organizer we need to...

- ✓ Learn about workers and their issues
- ✓ Get workers to elaborate
- ✓ Develop issues and flesh them out
- ✓ Ask follow up questions
- ✓ Listen for cues
- ✓ Get worker's personal story
- ✓ Ask fact-based questions and gather information
- ✓ Show workers that we are interested in them

ONE-ON-ONE COMMUNICATION - ROLE PLAY FRIDAY 3:30-4:30

PURPOSE: To give the participants a chance to try out some of the skills they are learning. To teach the skills of getting in the door and listening. To evaluate one-on-one skills.

STRUCTURE: We start out in the whole group to explain the exercise. Then we break down into small groups to role-play the **first two parts of a house call: Getting in the Door and Get the Story.** The TF sets the scenario and plays the role of the worker. A participant is chosen to play the role of the organizer. Each one in the group should have the opportunity to be the organizer during the 20 minutes before the TF rotates.

OUTLINE:

Describe the different scenarios to the whole group. Briefly teach the principles involved in each scenario:

- Get in the Door: be clear, communicate urgency, listen to worker, not talk at the worker
- Get the Story: ask questions to solicit issues, agitate around problems instead of solving them

BREAK INTO SMALL GROUPS

TF SET UP:

- When you get to the group, state the purpose of the exercise again: "We are going to practice getting in the door."
- Assign someone to be the organizer.
- The TF will play the role of the worker.
- Have the participant playing the role of the organizer.
- Read the scenario to the rest of the group. (Issue, problem)
- Ask for feedback from the group and give tips after each role play.
- Keep it moving to give everyone a chance.

When you rotate to the next group, find out if anyone did not get to be the organizer, or pick the person who went second last time around. Set the next scenario.

TIPS FOR ROLE PLAYING

1. Write down everyone's name as soon as you sit down
2. Use the scenarios we've suggested, or similar ones on the same theme
3. Note what scenario you set up for whom to jog your memory later
4. Takes short notes to remind yourself of how the participant did
5. Hold your comments for the middle or the end
6. Avoid getting "out of the role play" except for short comments
7. Keep the role plays short to give everyone a chance
8. Remember to teach: give constructive feedback, encouragement
9. Experienced organizers will vary on content between themselves. Focus on principles of organizing and principles of communication

Scene One: Getting in the door – 10 Minutes **Friday 3:35-3:45**

The Teaching Fellow plays the role of the worker. Set up the work site for the group.
The organizer knocks on the door cold, only knowing the person's name and where they work.

First worker: UNDECIDED. TF states: "this really is not a good time, can we schedule a later appointment?"

First organizer (name): _____

Comments: _____

Second worker: UNDECIDED. TF states: "I am really not interested in the union, you are wasting your time with me."

Second organizer (name): _____

Comments: _____

Third worker: UNDECIDED. TF states: "how did you get my name and address?"

Third organizer (name): _____

Comments: _____

Fourth worker: UNDECIDED. TF states: "I'm fixing dinner for the family, can you come back tomorrow?"

Fourth organizer (name): _____

Comments: _____

Fifth worker: UNDECIDED. TF states: "There is no point in talking to me…I'm quitting."

Fifth Organizer: _____

Comments: _____

Scene Two; Getting in the door – 10 Minutes **Friday 3:45-3:55**

The Teaching Fellow plays the role of the worker. Set up the work site for the group.
The organizer knocks on the door cold, only knowing the person's name and where they work.

First worker: UNDECIDED. TF states: "I really don't like talking about work at home. Can we do this later ?"

First organizer (name): _____

Comments: _____

Second worker: UNDECIDED. TF states: "I am really not interested in the union, things are ok at work."

Second organizer (name): _____

Comments: _____

Third worker: UNDECIDED. TF states: "how did you know I work there?"

Third organizer (name): _____

Comments: _____

Fourth worker: UNDECIDED. TF states: "The ball game is starting, can you come back tomorrow?"

Fourth organizer (name): _____

Comments: _____

Fifth worker: UNDECIDED. TF states: "There is no point in talking to me…I'm

Scene Two: Get the Story –15 Minutes **Friday 3:55-4:10**

The Teaching Fellow plays the role of the Worker. Tell the participants the workplace.
The organizer is already in the house of the worker so the role-play starts in the living room. The organizer only knows the workers name and where he works. The role-play should start by the organizer asking questions about the workers' job issues and what concerns he may have about the union.

First worker: UNDECIDED. Long-term employee. Interested in talking but somewhat guarded.
Issues: Single mother with two children. Health Insurance has just changed recently and now cannot afford the insurance premiums under the new plan. Son has asthma.

First Organizer (name)_____

Comments_____

Second worker: UNDECIDED. Chatty, scattered in conversation.
Issues: Has been working at the company for seven years and his supervisor is very demeaning and unreasonable. Only gives workers 2 hours notice before requiring overtime.

Second Organizer (name)_____

Comments_____

Third worker: UNDECIDED. Nervous about talking to the organizer.
Issues: Has worked in the shop less than one year and really needs this job.
When he/she started, was promised a raise after 6 months but has not yet received it.

Third Organizer (name)_____

Comments: _____

Fourth worker: UNDECIDED. Quiet. Short answers to questions.
Issues: Works the evening shift and has tried to move to the day shift for 2 years. Has been passed over by others with less seniority.

Fourth Organizer (name)_____

Comments: _____

Scene Two - Repeated: Get the Story – 15 Minutes **4:10-4:25**

The Teaching Fellow plays the role of the worker. Pick a workplace with the group.

The organizer is already in the house of the worker so the role-play starts in the living room. The organizer only knows the workers name and where he works. The role-play should start by the organizer asking questions about the workers' job issues and what concerns he may have about the union.

First worker: UNDECIDED. Needs to be drawn out.
Issues: Has been there for 10 years. Has been passed over for a promotion as a lead-person. Feels like he/she has not been rewarded for years of service and loyalty.

First organizer (name): _____

Comments: _____

Second worker: UNDECIDED. Self-assured, but private.
Issues: Supervisor is very abusive. Yells at workers. You have complained, but nothing was done. Instead, management gave you the hardest job hoping you'd quit.

Second organizer (name): _____

Comments: _____

Third worker: UNDECIDED. At job less than a year, talkative
Issues: low pay: has to work two jobs and extra hours just to make ends meet

Third organizer (name): _____

Comments: _____

Fourth worker: UNDECIDED. Tentative, timid but interested in talking.
Issues: Work Injuries: got carpal tunnel last year and still in pain. Feels the company doesn't care if workers get hurt.

Fourth organizer (name): _____

Comments: _____

House call video **Friday 4:30- 5:00**

Short House Call **5:00-6:15**

Get in the Door and Get the Story

Set-Up

You have practiced getting in the door and getting the story in small groups. Now you will practice getting in the door and get the story. You will be going to Teaching Fellow rooms, so you will actually have to get in a door, and get past any obstacles.

The only information you will have when you knock on the door is the workers name and the workplace. The workers you will be visiting work at Madeline Gardens, the workplace we have been using in all the exercises today.

Review Basics:

Ask open-ended fact based questions
Listen for cues and ask follow up questions

Don't make assumptions
Don't ask vague questions

You will be going in pairs, so take a moment before you go to make a plan about how you are going to work together.

When you are finished, stay in the room for a short debrief.

There will be two sets of teams. If you are going first, remember you must come back and tag the second team. You are free then until dinner. If you are on one of the second teams, you will have about 15 minutes before you have to go. You will need to be here when the first team comes back.

Instructions for Teaching Fellows:

There will be two teams that will come visit you in your room for a short house call: Get in the Door and Get the Story.

You will be playing the role of a worker at Madeline Gardens.

Pick one of the following scenarios, or choose your own. You should have one obstacle at the door and one or two issues. Be prepared to describe your job in detail.

Stop the role play when the participants move to talking about the union.

Do a short debrief and send the participants back to the main room.

Evaluate the participants on the following criteria:

- Introduces self in a clear concise manner
- Moves past obstacles at door
- Asks relevant fact based questions
- Actively listens and engages worker in conversation.
- Asks follow up questions based on worker's answers.
- Kept conversation focused on worker's issues and work life
- Moves from introduction to conversation quickly and smoothly

Team 1

_____

_____

_____

Team 2

_____

_____

_____

Scenarios:

At door: "I am really busy can you come back later?"
Issue: Has worked at Madeline Gardens for three years as a Direct Care Provider. Makes $10 an hour. Is not really concerned with money. Gets regular raises of at least 40 cents an hour. The facility manager is a real abusive pain. Is always coming in and screaming at people when there are problems whether it is their fault or not. Feels offended and disrespected but doesn't think anything can be done about it.

At door: "I am not interested" (When the participant asks "Why?" the TF should respond that you have no money to give to charity-you totally misunderstood what the participant is there for)
Identity: You work as a Job Coach. You make $9.50 an hour. You help clients find work and drive them to their work place and pick them up afterwards. You are upset because your boss told you that you would get promoted to coordinate client training over 5 houses and get a dollar raise, but then they hired someone from the outside

DEFINING THE UNION (CAPTIVE AUDIENCE MEETING) **FRIDAY 7:15 - 8:30**
SIMULATION - ALL TEACHING FELLOWS

PURPOSE: To introduce the participants to how the employer defines the union during an organizing campaign.

STRUCTURE: A mock "captive audience meeting."

OUTLINE:

1. TF sets the stage by briefing the entire group on the Marion Industries campaign (sheet in file box).

2. Participants are instructed to play the role of unorganized workers who are escorted into a break room for a meeting with the plant manager. They are not to speak or ask questions during the meeting.

3. A "plant manager" talks briefly about the status of the campaign by the union, and then introduces the new personnel director.

4. The new personnel director talks about making changes, his/her management philosophy, and the need to educate ourselves about the union. Introduces video.

5. Video shown—union strikes, violence, plant closings

6. Following the video, a laid-off worker from another facility is introduced by the personnel director to talk about the union.

7. Following the a laid off worker, the plant manager makes a brief statement and closes the meeting

Note: If you're short on time, eliminate the Personnel Director.

Time frame: 55 minutes total

- Preparation and Set Up for large group 10 minutes
- Plant Manager 5 minutes
- Personnel Director 5 minutes
- Video 10 minutes
- Plant Manager/Laid off Worker 10 minutes
- Debrief 15 minutes

PREPARATION FOR THE CAPTIVE AUDIENCE MEETING
TF_____

PURPOSE: To help participants understand the power of the employer campaign and put themselves in the setting of an undecided, fearful worker headed into an employer meeting.

STRUCTURE: TF prepares the group, reviews the background on Marion Industries, and instructs the participants to be undecided workers who are holding back because they're fearful about something - loss of job, being discriminated against, pressured to work harder, etc.

MARION INDUSTRIES CAMPAIGN BACKGROUND

Background:

-Marion Industries, a company based in Dayton Ohio, was founded in 1979 by Joe Marion, a native of Dayton. Joe came from a poor family and made good through his entrepreneurial skills, and founded Marion Industries to give back to the Dayton community.

-He paid slightly better wages than other jobs in the area and provided extra benefits such as scholarships to employees' children.

-The Company makes auto parts ranging from steering wheels, air bags, tire covers, arm rests, etc. and supplies mainly the "Big Three"-GM, Ford and Chrysler.

Operations:

-There are nine facilities in the Company, from Sewing, Assembly, Foam Dept., Cutting, Shipping and Receiving.

-There are approx. 1200 employees, 70% are men and 40% are African/American.

Union History:

-The UAW attempted to organize MI in 2001. The union lost 2 to 1 as the Marion sisters, Robin and Pam (Joe's daughters who now run the Company) asked for another chance and that Joe would never want a union to come between his company and the employees.

-The UAW has started another campaign to organize Marion Industries.

CURRENT ISSUES:

-No across the board wage increases since 2001, Christmas bonus was cut 50% last year.

-Poor treatment & favoritism by supervisors and pressure to make production

-Increase in work injuries.

PREPARING PARTICIPANTS FOR THE MEETING:

1. The company is calling a mandatory meeting on company time. The union election is in one month. You are going to this meeting as a Marion Industries worker.
2. You are UNDECIDED about whether you support the union. Throughout the whole campaign you have remained undecided.
3. Think like a fearful non-union worker. Identify something like fear of losing your job, you've been promised a promotion after the union loses, you have a relative in management, you're a single parent, etc. Stay in this role throughout the meeting.
4. You are an auto parts worker and this is one of the best jobs in your community. Try to imagine what this feels like during the meeting.

TAKE THEM TO THE COMPANY MEETING.

Marion Industries Captive Meeting - Script (give each person a complete set)

Roles: Plant Owner (Robin Marion)
New Human Resources Liason (_____)
Laid Off Worker (Gloria Sampson)

ROBIN MARION:
Glad to see everyone. As you know this company was started by my father Joe Marion in order to provide jobs and a brighter future for the community here in North Dayton. I want you to know that we in management are aware that it's been a hard year for the Marion Industries family; for us and for each of you. We can pull out of this and have a stable, productive future, if we pull together. I called this meeting to outline to you some of the challenges we face and some of the solutions we see. And frankly, some of the so-called solutions we believe would be catastrophic. You know what I'm referring to here. The union, The UAW.

First, let me say that the changes we made earlier this year were painful but necessary. We needed to cut the bonus this year because of the investments we put into our three joint ventures. Although it is tough now, we will see success in the future Because of our long history of commitment to the community in North Dayton, we kept everyone working, despite the fact that we had to make some difficult decisions.

People have asked me if management has make sacrifices. Let me tell you they have. But to take it to the top, I am announcing today that for the next three years, until the company is back on its feet, I am taking a 20% cut in pay.

- We gave you two flyers at the beginning of the meeting. We challenge and you should challenge the UAW that if they call a strike they will guarantee that you won't be permanently replaced.
- Where is the dues money going? It seems the union is losing members every year and needs your dues money to pay the salaries and expenses of all the union bosses and officials.
- Also, many of you have asked how you can prevent these union organizers from further disturbing you in your home. Well, you don't have to let them in, but there are many complaints about people being harassed by the union and unfortunately, we cannot stop them from invading your privacy. That's why many have told us they are voting No. You feel that the union pushers and outsiders to our North Dayton community don't respect the workers here. We've heard people are living in hotels here are from places like Chicago and Washington D.C. to try to get you to vote yes.

I have heard people say that they wanted to hear the truth about the UAW. In response to that, I have named a new Human Resource Director who has had a lot of experience dealing with the UAW. I want him/her to have a chance to meet you now.

HUMAN RESOURCE DIRECTOR:
Thank you, Robin. Well, I've had a chance to talk with many of you one on one in the past week. I sympathize with your frustrations. Many of you have legitimate grievances about the way things have been handled. The problem is, the union is not the answer. There was a union at my last job. Communication isn't better with union. It's worse.

Your jobs are not more secure with a union. They are less secure. And your benefits are not guaranteed with a union. And your lives do not automatically improve with a union.

So obviously the union isn't the answer. But you have legitimate grievances. You want your bonus restored. You want your health insurance co-pay to be decreased. You want to be treated decently. You want a voice. Okay. So how can we make that happen? We can work together. We can get this company back on track by rolling up our sleeves and working together. I have clear instructions from Robin to change the way things work around here - to improve communication, not by bringing in a third party, but by talking with each other and really listening. Vote yes and walls will go up, they have to. That's the way unions do business. By division, hatred and confrontation. Vote no and we have a chance to do what's right together.

What happens with a union? Dues happen. Strikes happen. Broken promises happen. As I have said, I have experience working with many unions, not only the UAW. The management at Marion Industries has made it clear to me that, they don't want to waste their money on an anti-union campaign, with movies and lots of lawyers. We would rather spend our time and money on our workers. But I do think that it is important for you to see what unions are really about. The following video depicts how the United Auto Workers Union (UAW) betrayed workers when trying to negotiate a contract the company could not afford. The plant was Dana, a manufacturer of car parts, very similar to what we do here at Marion Industries. It happened there. The same thing can happen here.

SHOW VIDEO

ROBIN MARION:
Well, I think you can see that, what happened at Dana could happen here. The UAW has a history of trying to negotiate contracts that companies cannot afford. They believe in strikes, and are willing to make workers stay out for long periods of time. I suppose you can say we are just management saying these things. Well, let me introduce to you a worker like yourselves who has direct experience with this union.

GLORIA SAMPSON: (SEE SCRIPT FOR LAID OFF WORKER)

ROBIN MARION:
I appreciate you all listening. I know we can't make promises and tell lies like they can at the union meetings. In fact, there's plenty I would tell you if I could about how things could improve here. But my hands are tied until after the election. We've run out of time for questions. If anyone would like to talk to me individually, my door is always open. The personnel director will also be available

SCRIPT FOR INJURED WORKER (adapt as needed)

My name is Gloria Sampson. I worked at Guardian Industries, an auto parts plant right here in North Dayton. I came here today because this is this same union; the UAW came to Guardian about seven years ago. I wanted you to know what we've been through.

Seven years ago I was new at Guardian. I worked in the shipping and receiving department. I had some complaints. Who doesn't? Wages were too low; supervisors were hard on people, that sort of thing. Well the union said they could take care of all that. All we had to do was sign their papers and vote yes in the election. A lot of people did. I have to admit I even went for it. I hoped they could make things better.

Well, we won the election. Everyone was so happy. We thought things were going to get better right away. But nothing happened. Same pay, same everything. Months went by. The union said there was nothing they could do. Management said they couldn't even give us the raises because of the union. We were pretty disappointed.

That's when we started to hear talk about a strike. There's nothing else we can do, that's what the union people were saying. I didn't want to strike, and I didn't know too many people who did. But they held some kind of meeting down at the union headquarters and came out saying we were on strike. I stayed away from work to see what would happen. The company hired new people to take our jobs right away. The union people were marching and picketing in front of the plant. I felt so sorry for all the people with families, not getting any pay or public assistance.

But I had to take care of myself. I was pregnant at the time, and needed to think about the baby. So after two weeks, when nothing had happened, I went back to work. I could tell things would never be the same. We had been like a family in there, even though conditions weren't perfect, at least we got along. I looked at the faces of my coworkers when I went into work, and I could tell that this would always come between us. What I didn't know was how far they would take it.

One night as I was coming out of the plant, I could see a group of strikers were at the gate. I didn't know what else to do, so I got in my car and started to drive out. They surrounded my car and I had to stop so I wouldn't hurt anyone. They started rocking it back and forth, and banging on the windows, yelling names at me. Someone was banging on the windshield with a two-by-four. I really panicked then. I started to get out of the car. As I was stepping out, I got squeezed between the car door and the car. Then something hit me and I blacked out.

I woke up the next day in the hospital. That's when they told me I had lost my baby. It wasn't worth it. The union lost that strike, and most people never got their jobs back. These were regular people, like you, who were lied to and misled by union organizers. Don't you make the mistake we did. Don't believe their lies and promises. Thank you.

DEFINING THE UNION DEBRIEF
(CAPTIVE AUDIENCE MEETING)

PURPOSE: To assess the employer campaign and challenge the participants to understand the importance of one-on-one's, inoculation and committees in a campaign.

STRUCTURE: TF leads the discussion with the group in the same room as the Captive Audience. Other TFs should add stories of how they have helped committees deal with captives.

A. General Questions

1. For those of you who <u>really tried</u> to stay undecided ... how did this video affect you?
2. If you were scared and undecided ... what would you think about the union now?
3. Would you talk with a union organizer, or let them in your house after this?
4. If you had been visited by an organizer and inoculated, how would you feel? If you had been visited by an organizer and <u>not</u> inoculated, how would you feel?

B. The Campaign will be decided on questions of who workers believe and trust and who has credibility

1. Company campaign focuses on:
    - Union is a third party
    - Fear Tactics
    - Union doesn't tell you the whole story
    - What else

2. How do we combat that?:
    - Strong committees to combat third party
    - One-on-one visits that cover:
    - Issues and building relationships with workers
    - Education
    - Inoculation
    - Workers are the Union and Building Worker Leadership
    - Getting workers committed to take action in campaign
    - Having a strategy and plan for the campaign that the committee is included in

Teaching Fellow Panel Discussion **Friday 8:30 9:00pm**

Purpose: To give participants a better sense of what the life of an organizer is. To have teaching fellows share their experiences of union organizing.

Set-up: Participants are seated in the U-shaped room. TF's are seated in front of the Room. An OI staffer facilitates the discussion and is the timekeeper.

The OI staffer will explain that each TF will pick a question out of a hat. The question will relate to the TF's organizing experience, campaign work, personal reasons for being a union organizer, etc.

The TF will have 5 minutes to respond to the question. The OI staffer then moves to the next TF to pick a question out of a hat. Each TF will only answer one question.

QUESTIONS:

Describe the single worst thing you have seen a company do

Describe the best victory you have been a part of

Name one worker that you have meet who has inspired you and why

How long have you been organizing and what keeps you going?

What would you say to some one who is considering this work to inspire them to do it?

What is the hardest part of this job?

Name three things that one would need to have in order to be an effective organizer

What is one thing that the labor movement needs to do to stay relevant in the 21st century

What would happen if we stopped organizing?

STEPS OF A HOUSE CALL **Saturday**

PURPOSE: To review the basic goals of one-on-one communication. To learn the steps of a house call: Vision of the Union, Inoculation, Assess and Agitate, and Move to Action. Role-play these steps of the house call.

1. **Vision of the Union.** Address workers concerns and misconceptions about the union. Define the union as an organization through which workers have the chance to fight for what they want.

2. **Inoculation.** Prepare workers for the company's anti-union campaign. Educate workers by 1) helping them to understand why the boss fights against the union 2) discussing the boss' specific arguments and 3) explaining likely tactics the boss will use against the union.

3. **Assess and Agitate.** Challenge worker to join the campaign to organize the union. Agitate the worker on their issues. Communicate urgency. Challenge worker to take responsibility and deal with their problems at work.

4. **Move to Action**. Get a commitment from the worker that they will help build the union in their work place. Give them a task based on the union campaign plan and your assessment of their abilities.

VISION LECTURE **Saturday 9:00-9:45**

We are now at the point in the house visit where we can start talking about the union. We call this giving a vision of the union. It is the part of the house visit where we talk with the worker to give them a sense of how things could be different if they work with their co-workers to form a union.

Why didn't we start the conversation by talking about the union?

Because we want to know about the workers problems at the workplace
Because we want to know about the worker and what he/she is concerned about

The more thoroughly you are able to get the workers story, the more effective you will be at giving a vision of the union.

How do you know you are finished with get the story and ready to move to vision?

You have explored the major issues (wages, benefits, work rules, policies favoritism, treatment by supervisors)
You have identified issues that the worker is angry about and talked about them in depth.
You understand how those issues affect the workers life.
The worker has re-lived the issue and is angry and wants to do something about it.

You can start this part of the conversation with a transition question. "Do you know how <u>your issue</u> could be different if you organized a union?"

Most workers who do not have experience with unions have very little sense of how unions make a difference. Their experience is that nobody ever speaks up and nothing ever changes. Our job as a union organizer is to give people a sense of how things could be different and give them a vision of something worth fighting for.

This discussion should have the following qualities: (List on Flip Chart)

It is **Specific** It addresses the issues the worker has talked about in Get the Story. You would not talk about pension with a young worker. You would not talk about lack of health insurance because that issue was important to other workers. Make sure you are talking about an issue that the worker has identified as important.

It is **Simple and concise.** It is easy to understand and does not use jargon that someone with no union experience would not understand (ie seniority clause, business rep, committeeman) Do not give long involved technical explanations. Remember the rule that the worker should talk more than the organizer, even during th part of the house visit. Keep it simple. If the person you are talking to wants more details they will ask.

It is **Inspiring!** Remember this part of the house visit must inspire workers to take action is the face of an intense campaign by the boss to stop the union. We must show workers that it is possible to make the changes they would like to see. It should give examples of how other workers in similar workplaces or with similar problems stuck together and made a difference. If you are a union member and have had an experience that is relevant, this is an excellent place to tell a personal story.

It's about power! In a non-union workplace who makes all the decisions? The boss. The boss can change pay and benefits at any time. The boss can make any rules that they want. They can fire anyone at any time for any or no reason. Forming a union is like building a revolution in the workplace. The boss will never be able to make unilateral decisions about wages and working conditions again. All wages and working conditions must be negotiated. For most workers, having a union is the only way they will ever have the power to make the changes they want in the workplace.

Use the following example of how to create a vision of the union, or use a personal example:

Nursing home workers often face the problems of lack of staff and/or lack of supplies and equipment to give adequate care. In a non-union nursing home, workers complain to the administration with no results. Workers often get blamed for the lack of care, especially if there is a complaint from a family member about the care of a resident. Workers can get fired for talking with family members about what the real problems are. When nursing home workers are in a union, they are not afraid to speak up to get better care for residents. In some nursing homes, workers have gotten together, put out leaflets about the lack of staff and supplies, and joined with family members to make the administration of the home address the issues.

Let's review some of the most common problems that unorganized workers face on their job and how those issues are addressed in union contracts.

Ask union members present to say how these issues are addressed in their contracts. Draw out how workers have power beyond "filing a grievance" and "we call t he union rep". If the union member uses union jargon, ask him/her to rephrase.

The employer says he cannot increase wages and benefits and stay competitive.

Workers in unions go as a group asking together. That gives them a lot more power than asking individually. If there are limited resources for raises and benefits, the workers get to decide how to divide it up for the benefits they want. If the employer says that they can't afford raises, union members have the right to look at financial records and make sure that is true.

There is favoritism in job assignments and promotions.

Most union contracts have a fair procedure for making job assignments and promotions based on how long someone has worked. This is a lot fairer than letting the boss choose.

The boss is difficult and abusive.

Workers who have an abusive boss can get together and take the problem to management. The employer has to deal with it because most union contracts have a procedure, called a grievance procedure, resolving workplace issues. Any employer who has to deal repeatedly with the complaints about an abusive boss is going to make sure the abusive boss changes the behavior or the company will get rid of the problem.

How do these union solutions get into a union contract? Does the union come in and negotiate it for the workers?

No! The workers have to fight for it. Winning their union is just the beginning. After the workers win the union they will have an organization that gives them the power to start making changes in the workplace.

How does that happen?

At this point, you may pick a participant who has recently won an important issue in a contract fight. The participant should identify the issue and what the union members did to win the fight. As the participant tells the story, draw out and identify the following components of a contract fight:

--Elect a representative bargaining committee
--survey the membership to identify the most important issues
--present proposals to the company
--take action on the shop floor
--ratify the contract
--train the stewards and members to enforce the new contract

Sum up:

Start by asking the transition question: Do you know how things would be different if you organized a union?

Explain how a union could solve their problem

Give the worker a sense of how the union changes the power relationship at the workplace.

VISION ROLE PLAYS **(20 min each)** **Saturday**

BREAK INTO SMALL GROUPS

TF SET UP:

- When you get to the group, set the scenario again: "we are going to practice the vision of the union part of the house call"
- Assign someone to be the organizer.
- The TF should play the role of the worker and set up a workplace
- **READ THE ISSUE STATEMENT TO THE ENTIRE GROUP**
- Ask the participant playing the organizer to ask the transition question
- Read the **Worker's Reply** statement to the rest of the group
- Continue role play based on your character
- Ask for feedback and give tips after each role-play.
- Keep it moving to give everyone a chance.

When you rotate to the next group, find out if anyone did not get to be the organizer, or pick the person who went second last time around. Set the next scenario, and prep worker.

Roleplay: Vision of the Union **Saturday 9:50-10:10**

The Teaching Fellow plays the role of the worker. In each scenario read the workers issues in the bold type tc the group.

Instruct the organizer to start by asking: "What happens when you and your co-workers talk to management about (their specific issue?) or use the question: Do you know how (their specific issue) might be different if you had a union?

First Worker: UNDECIDED
Issue: Unfair Terminations (tell the whole group)
Workers reply: All of a sudden someone you work with is gone and you hear a rumor that they were caught stealing company property, or were sleeping on the job. You always hear people talking among ourselves, bu no one ever asks the supervisor cause they are afraid they'll be next.
Organizer _____

Comments _____

Second Worker: UNDECIDED
Issue: Job Security—job vacancies are being filled with part-timers with no benefits
I think most people are just glad they still have a full time job with benefits. I bet the new folks would like th too, but how can we make the company hire full time workers?
Organizer _____

Comments _____

Third worker: UNDECIDED
Issue: workplace injuries
We have a form for reporting bad equipment, but it takes forever to get repairs. Meanwhile, the equipment st on the floor and more people get hurt.
Organizer _____

Comments _____

Fourth worker: UNDECIDED
Issue: Loss of benefits/reduction of vacation from 3 to 2 weeks per year
People complained but the personnel manager said they were doing everything they can just to keep the company going. We all have to do our share.
Organizer _____

Comments _____

Role Play: Vision of the Union **Saturday 10:10-10:30**

The Teaching Fellow plays the role of the worker. In each scenario read the **worker's issues** in the bold typed sentence to the group. Ask the participant playing the organizer to step out of the group for a moment. Read the **Concern** statement to the rest of the group. The person playing the role of the organizer should give a vision of the union that addresses this worker's issues.

The organizer should start by asking, **"What happens when you and your co-workers talk to management about *(their specific issue)*?"** The Teaching Fellow may also use the question: **"Do you know how *(their specific problem)* might be different if you all organized a union?"**

First worker: UNDECIDED
Issue: low wages. **(tell the whole group.)**
Worker's Reply: We always tell the supervisors in the company meetings that our wages are not competitive and that we need more. But, they never listen. They always say that they are looking into it or that there isn't enough money. I don't see how organizing will change that.
Organizer: _____

Comments: _____

Second worker: UNDECIDED
Issues: favoritism in promotions. **(tell the whole group.)**
Worker's Reply: Nobody ever says anything to management about the favoritism. Everyone knows you'll never break up the old boy network. That's just how things work.
Organizer: _____

Comments: _____

Third worker: UNDECIDED
Issues: supervisor is abusive when workers are unable to make production quotas. **(tell the whole group.)**
Worker's Reply: People complain to each other but not to management. I think a union would create a lot more conflict at work. Supervisors would really be angry at us if we try to get a union.
Organizer: _____

Comments: _____

Fourth worker: UNDECIDED

Issues: Expensive health insurance. **(tell the whole group.)**
Worker's Reply: I tell my supervisor every year that the health care is too expensive and he always says that management is looking into it. You will never get people together where I work. They are always fighting ea other about something.
Organizer: _____

Comments: _____

Inoculation Lecture **Saturday 10:40-11:00**

Inoculation. We need to prepare workers for the company's anti-union campaign. We do this by letting the workers know what the company will say and do during their anti-union campaign. You can transition from Vision to Inoculation by asking one of two questions: **"What do you think the company or administration will do if you try to organize a union? Why do you think the company or administration will try to figh the union?"**

Why do we want the worker to tell us what they think the company will say and do? Workers wi tell you their own biggest fears first. You can inoculate them on their own concerns and worries.

Why do we want the worker to explain *Why* the boss will fight the union? This helps the worker analyze that the goals of their bosses (i.e. to make money or cut budgets) and of the workers (to be paid what they are worth) are at odds.

Every time you inoculate on an issue you are educating the worker on how the union functions. For instance, when the company says that the workers will have to go on strike to win anything. We respond l educating workers on how a strike is decided democratically by the workers and how workers can pressure the company without going on strike through work actions, petitions, community support, through pressuring customers, lenders, or targeting CEOs, through the media or politicians or any other place the company is vulnerable.

Exercise: In the large group, let the participants make a list of things the company will say and do during a union campaign. Then have people explain how they would inoculate against that. **(For training purposes, we should ask the participants to always inoculate on a shortened list of concerns such as Strikes and Getting Fired for Organizing.)**

The Company Will Say/ Do: **The Reality Is:**

Fire or Threaten to Fire Union Supporters
Threaten to Close
Refuse to Negotiate
Organizing is Futile/ You Can Never Win
Union Just Wants Your Dues
Strikes
Fees/Fine/Assessments
The Union is Corrupt
Anti-Union Meetings/Videos
One on One Meetings

Deporting Undocumented Workers
Give Us Another Chance
Union is an Outsider

End this section by reiterating that, despite all of the company's tricks, workers stick together and win all of the time. It isn't because workers learn all the answers to these question, but rather because they understand what a union is and why the boss fight against the workers.

Role Play: Inoculating on the Company's Campaign **Saturday 11:00-11:20**

The Teaching Fellow plays the role of the worker. In each scenario read the **worker's issues** in the bold typed sentence to the group. Ask the participant playing the organizer to step out of the group for a moment. Read the **Reply** statement to the rest of the group. The person playing the role of the organizer should inoculate on the concerns raised by the workers. Besides the specific concern of the worker, all organizers should inoculate on **Strikes and Getting Fired.**

The organizer starts by asking: "What do you think your boss/employer will do when you and your coworkers start organizing a union?"

First worker: UNDECIDED
Issues: job security, people get fired all the time for no reason. **(tell the whole group.)**
Worker's Reply: The boss will just fire the pro-union workers. There was a guy here several years ago that told the company he was going to call a union and the next day they fired him for some little thing.

Organizer: _____

Comments: _____

Second worker: UNDECIDED
Issues: boss gives good raises to his friends and relatives, less to everybody else **(tell the whole group.)**
Worker's Reply: The company would do anything to stop this union. Things would probably get worse at work, not better.

Organizer: _____

Comments: _____

Third worker: UNDECIDED
Issues: no health care insurance **(tell the whole group.)**
Worker's Reply: The boss will probably just tell us that they can't stay competitive with a union and that some of us might lose our jobs. They would probably close the workplace down.

Organizer: _____

Comments: _____

Fourth worker: Pro-Union, overoptimistic
Issues: low wages, small raises **(tell the whole group.)**
Worker's Reply: I'm not sure if the company would be against a union. Maybe the union should just call up the owner and see if we can work something out.

Organizer: _____

Comments: _____

Role Play: Inoculating the Employer Campaign **Saturday 11:20-11:40**

First Worker: UNDECIDED
Issue: holiday and vacation pay
Workers reply: I don't know. I think that the threat of a union might even help us. The bosses are nice as can be since there has been talk of a union. They know we are unhappy about the holidays and vacation pay, so they might even give it to us to keep the union out.

Organizer _____

Comments _____

Second Worker: UNDECIDED
Issue: Favoritism in work assignments
Workers reply: I think that they'd try to find out who was behind the union thing and start giving them the really lousy assignments, like the 5 AM shift. That would shut everyone up fast.
Organizer _____

Comments _____

Third Worker: UNDECIDED
Issue: Hours/schedule
Workers reply: They show everyone a video against the union on the day we are hired. They have made it very clear that we'll never get a better deal than we have now, even with a union. They've got half the people at the place believing it.
Organizer _____

Comments _____

Fourth Worker: UNDECIDED
Issue: Workplace injuries
Workers reply: They are going to be really mad. They will probably send all the supervisors out on the floor to try to figure out who is behind it and make our lives miserable.
Organizer _____

Comments _____

GETTING CAMPAIGNS STARTED — Saturday 11:40 – 12:15

PURPOSE: To teach the basic steps involved in getting a campaign to the point of demanding recognition and/or petitioning for an election. To help participants understand the strategic decisions that set the direction of a campaign.

OUTLINE

I. Campaign plan (Illustrate points with a campaign that you have worked on)

Phase I: Campaign start up

1. **Selecting a target**
   - what are some criteria for selecting a target? (Assists in bargaining, winnable)

2. **Research**
   - what should you find out ahead of time? (financial health, size, demographics, history, corporate structure, etc.)

3. **Initial contacts**
   - where do they come from?

4. **Building a list**
   - how do we do it?
   - why is the campaign often underground at this point?

Phase II: Building a majority

1. **Committee Building**
   - how is the committee identified? Recruited?

2. **One on one communication**
   - how do we assess workers' support for the union?
   - how do we reach a majority of the workers?

3. **Sign up**
   - when do we start sign-up and how long does it take?
   - should workers be encouraged to keep their signatures confidential?

The Win Rate is 60% in units where there is a 74% sign-up. The Win Rate is 33% when 50% signed.

4. Rights of Immigrant & Undocumented Workers

- Regardless of a workers immigration status, every worker has the right to organize and is protected and covered equally under US Labor Laws. However, since 9/11 there have been some major changes in immigration law that may impact your campaign and you should make sure you've done your research.
- Should immigrant workers be encouraged to take an active role in the campaign?
- What are some things that you should consider when organizing immigrant workers? *(from where did the workers immigrate and what is their perception/experience of the union, immigration status, i.e. undocumented v. refugees, language, customs, etc.)*

3. Types of campaigns/the roads to recognition of the union:

- **An election campaign:** recognition is sought through a secret ballot election conducted by the NLRB (National Labor Relations Board) in the private sector or a different government agency in the public sector. 50% plus one of the workers voting must cast "yes" ballots in order for the union to win. A union must present the NLRB with at least 30% of the workers on authorization cards/petitions before an election can be held.

- **A non-election /recognition/card check campaign**

No government agency conducting an election, instead it tends to look like this:

a. A majority of workers sign authorization cards or a public petition.
b. The union pressures the employer to recognize the union and bargain.
c. Majority support can be verified by a neutral third party.

Typical pro's of non-election campaigns: Doesn't leave the workers as vulnerable to the bosses war during the weeks/months you are waiting for the government to conduct a "fair" election. By pursuing a strategy where the union must build leverage and leadership before making demands on the boss, it is usually easier to get the boss to drop the hostile tactics and recognize the union.

Some con's of the non-election strategy: It can take a long time and require huge institutional resources of money and relationships with union employers before we make the boss recognize the employees trying to organize.

II. Campaign strategy

When choosing a campaign strategy, what are the variables to consider?

- The law that covers these workers
- Relationship to union's base—customer/supplier, competitor, non-union division/subsidiary (sister facility)
- Employer campaign — what level of opposition
- Resources — member involvement, staffing

Bargaining to organize

- How can we get recognition or neutrality at the bargaining table?
- What are the obstacles?

Using leverage to change employer behavior

- What pressure can the union put on the employer?
- What are the obstacles?

Some examples of where this strategy has worked (use what you know)

- MGM Grand — Las Vegas — 5,000 workers — HERE
- Southwestern Bell — CWA
- Marshall's — UNITE
- Sunrise Hospital — election with neutrality — SEIU

III. Summary

- Building a strong foundation of worker support and leadership.
- Rooting the campaign in issues and a vision of change.
- Understanding the power of the union and the employer in each campaign is the foundation of the strategy Union controls pace and scale on the front end.

Assess/Agitation and Move to Action Lecture **Saturday 1:00 – 1:30**

I. Assessment and Agitation: After you have given the worker a vision of how things would be different and prepared them for the anti-union campaign, it is now time to assess their support for organizing a union.

a. Assess: How do we know if a worker is ready to help organize a union? Ask them! You can transition from Inoculation into Assessing and Agitating by asking the worker if they are ready to form a union: **"Are you ready to stand with your co-workers and work to form a union?"** If they say "No" ask what is holding them back.

b. Agitate: How do we move workers from being uncertain to supporting and working for the union? We agitate them. What does it mean to agitate? We agitate a worker by making them uncomfortable with the way things are at work. We want to use the issues that they gave us during the Getting the Story part of the conversation, to remind them of the difficulties they face at work and the history of problems they have experienced. We want to revisit their lack of power on important decisions made by the boss.

Emphasize a sense of urgency. The union campaign is paid for by union member's money. We have a limited time and if we don't have enough support here we will find workers at another workplace to organize.

Explain to workers that they have a choice. If you do nothing, you get nothing. If you stand up with your co-workers you will have a say in what goes on.

For instance: "You've told me that your children can't get health care because the company raised the insurance rates. How will things ever change unless you and your co-workers make a decision to change things? This is your opportunity to make a difference so that things are better in the future."

II. Move to Action. In order to win a union campaign workers must do much more than just sign union cards. They must do the work to organize the union. We should ask every worker to commit to take as much responsibility for organizing the union as possible.

What can we challenge workers to do to help organize their union? Depending on the union's campaign plan below is a possible list of things we could ask them to do. Ask participants to list some of the things that we might ask workers to do in order to help build the union.

Map out the work place
Do housevisits
Make phone calls to other workers
Set up small group meeting with department
Speak out in captive audience meetings
Sign an Authorization Card
Identify leaders
Get a list of all workers.
Come to/Join the Org Cmt.
Leaflet outside the work place
Pass leaflets inside the work place
Appear on a leaflet
Sign up co-workers
Make a list of names of workers they know

Explain Authorization Card - This is a union membership card. It authorizes an elected negotiating committee to bargain with the company over your wages, benefits and working conditions

How do we end the housevisit? Do we say "Thank You"? Organizers usually do not thank the worker. In fact, in a good house call, the worker will thank us. The worker is not doing us a favor; we are helping them gain power on their job.

Role Play: Assessing Worker Support and Agitating on Issues **Saturday 1:35 - 1:55**

The Teaching Fellow plays the role of the worker.

How do we know if a worker is ready to form a union? We ASK them! When we know the issues and have inoculated/educated the worker, we should ask the assessment question: ***"Are you ready to stand with your co-workers and work to form a union?"*** If the worker is unsure, we need to revisit their issues and AGITATE around them.

In this role-play, the TF should tell the group the worker's issues. The organizer begins the scenario by asking the assessment question.

First worker: LEANING TOWARD UNION
Issue: Company didn't give a raise they promised
Worker's Reply: I want a raise now and I don't care how I get it. I really need the money. So if this union stuff helps us get a raise now that is fine with me. But, I am <u>not</u> interested in getting on the company's bad side.

First organizer (name): _____

Comments: _____

Second worker: LEANING TOWARD UNION
Issue: Workplace injuries, got carpel tunnel on the job
Worker's Reply: I will vote yes in the election, but I don't want anyone to know you're for the union. I would not want to sign a union card because someone might find out.

Second organizer (name): _____

Comments: _____

Third worker: UNDECIDED, professional employee
Issue: Management doesn't listen, makes decisions on their own.
Worker's Reply: I'll sign a card to get management's attention but I'm not sure I really think that forming the union is the right thing. I don't think that a union is necessarily going to make communication and respect issues better, maybe the bosses will just treat us worse.

Third organizer (name): _____

Comments: _____

Fourth worker: LEANING TOWARD UNION
Issue: Treatment by supervisors, dignity
Worker's Reply: I want to see a change, but I don't think getting confrontational is really the answer. I think there are too many workers at this place who are too scared to vote for the union.

Fourth organizer (name): _____

Comments: _____

Role Play: Moving Workers to Action **Saturday 1:55 - 2:15**

The Teaching Fellow plays the role of the worker. Read all the bold type.
Teaching Point: It is impossible to win a campaign if we cannot move workers to take ownership of the campaign by taking action. As we reviewed earlier, there are many things that a worker can do to get involved: be on the committee, talk with co-workers, house call, leaflet, etc.

In this scene all the workers are pro union, and have answered yes to the assessment question. It is now the organizers job to move them to take action. Start the role play by telling the group the worker's issues and the action that the organizer should want them to take. The role play begins by having the participant ask the worker to do the Action.

First worker: PRO-UNION
Issue: boss's broken promises (tell the whole group)
Action: Sign a union authorization card
Worker's Reply: I was active in the union campaign before, and we lost. I don't trust that my co-workers will stick together and I think others should take the lead this time.
First organizer (name): _____

Comments: _____

Second worker: PRO-UNION
Issue: boss doesn't listen, then he blames the workers for quality problems
Action: move worker to house call the undecided people in her dept
Worker's Reply: I am very busy with community activities. I'll sign a card if that's all I have to do. I don't have time for house calls. I am on the PTA and the community council and I'm a deacon at my church. So I am very busy.
Second organizer (name): _____

Comments: _____

Third worker: PRO-UNION, you are a natural leader of others in your department.
Issue: treatment by supervisors, for yourself and your friends.
Action: getting names/addresses of the assembly line workers in your dept
Worker's Reply: I don't hang out much with the production workers. Besides some of them don't speak English. Someone else should talk to them about getting that information. I just want to talk with the people in skilled departments.
Third organizer (name): _____

Comments: _____

Fourth worker: PRO-UNION
Issue: safety on the job
Action: Sign a union authorization card
Worker's Reply: I don't want to make any enemies. The boss is calling the people for the union "pushers" and "loudmouths". I think people should just make up their own mind. I'm sure the union will have enough support without me.
Fourth organizer (name): _____

Comments: _____

FIRST HOUSE CALL: MARION INDUSTRIES **Saturday 2:15 - 2:35**
ROLE PLAY

PURPOSE: To give the participants a chance to carry the whole agenda of a house call in a simulated campaign environment. To allow the TF to observe the participants' ability to pull together material taught throughout the weekend.

STRUCTURE: The group is briefed on the background and issues of an actual campaign. Then the participants are broken into teams of two and given house call sheets for the worker they are going to visit. The Teaching Fellows are given information on the worker they are going to portray. Each TF is visited by two separate teams of "organizers." After they are done, the TF debriefs each of the teams and gives them feedback. After everyone is done, the group comes back together for a report on the campaign.

OUTLINE:

1. Briefing on background of the campaign

2. Review of house call agenda and goals of visit

3. Break into teams, give out house call sheets

4. Teams get to prepare for their house call
   Teaching Fellows go to their "homes"

5. First team visits Teaching Fellows
   Second team plans visit

5. First team debriefs with Teaching Fellow ***immediately after HC***

6. Second team visits Teaching Fellows
   First team reports visit to debrief person in front of the chart in main room

8. Second team debriefs with Teaching Fellow ***immediately after HC***

9. Chart house call on wall chart

HOUSE CALL: MARION INDUSTRIES **SATURDAY 2:40 – 3:50**

PURPOSE: To set the stage for the campaign, review the steps of the one-on-one and give dispat instructions to the teams.

STRUCTURE: TF sets the stage for the campaign, reviews the one-on-one 5 steps, and gives instructions f dispatching, doing first house call, reporting and preparing for 2nd visit.

A. **Setting up a Campaign House call Blitz - Marion Industries**
1. Review Marion Industries background and issues.
2. Review Information and Goals for the Blitz this weekend (see handout)

B. **Hand out and Explain**
- Campaign prep sheet
- House call prep sheet
- House call Report
- Authorization Card

C. Review the 6 steps of the house call
(Remind them to inoculated on Strikes and Getting Fired.)

D. Explain rating system and need for rating system

E. Explain Authorization Card - This is a union membership card. It authorizes an elected negotiating committee to bargain with the company over your wages, benefits and working conditions.

F. Explain and Review House call Sheet - Make sure participants understand that they should leave the house call with the necessary information to fill out their house call sheet. Talk about "issues" and "concerns"

G. Explain Wall Chart

E. Dispatch Information

1. Go out in teams of two (if the house call is a team effort) – instructions

•Prepare visit with partner and decide who will do which part
•Go out on house call and then immediately get feedback from TF visited
•Come back and report in immediately to debrief person so the second team can be dispatched
•Fill out your house call sheets
•Fill out results on wall chart
•Discuss with partner what you'd do differently in a second visit

F. Debrief House call. After both groups have gone reassemble in big group and debrief the house call. As participants what went well and what was difficult for them. Give participants a chance to ask general questio about their house call.

INSTRUCTIONS FOR TEACHING FELLOWS – ROLE PLAY OF WORKERS DURING THE WHOLE HOUSE CALL

1. LET THEM IN THE DOOR
   See how they introduce themselves and their reason for being there, have one or two reasons why you are reluctant to let them in, see how they handle it, then let them in.

2. FOLLOW ROLEPLAY SCENES
   Check your background sheet to see what your issues and concerns are, and what you already know about unions. Be believable and movable.

3. ONLY GIVE INFORMATION YOU ARE ASKED FOR
   When it comes to information like job title, shift, salary, and seniority – only tell them what they ask you. If they never ask, they will have an incomplete house call sheet when you debrief.

4. HAVE REAL ISSUES
   Painful issues. Heartfelt issues. Get into character; think about the stories behind the issues.

5. WAIT AND SEE IF THEY CAN PROBE
   Don't spill your issues if they ask general questions like "do you have any problems at work?" If they ask general questions, give general answers like "Not really" or "More pay, I guess."

6. IF THEY DON'T GET YOUR ISSUES, EVENTUALLY TELL THEM ANYWAY
   If they have moved beyond drawing out your issues and are obviously not going back (say 10 to 15 minutes into visit), tell them anyway. This is important, because we need to see if they can draw on your issues when moving you to action, even if they can't probe for them.

7. HAVE SPECIFIC CONCERNS ABOUT THE UNION
   Have real concerns, but remain undecided.

8. BUT BE RELUCTANT TO TAKE ACTION IF YOUR ROLEPLAY HAS YOU UNDECIDED
   Have obstacles to signing anything or coming to a meeting. See if they go back to your issues, and/or create a sense of urgency, to get you to move.

9. SIGN CARD AND JOIN COMMITTEE ONLY IF YOUR ROLEPLAY CALLS FOR IT

B. Teaching Fellow Guide for House calls

Organizer_____ Teaching Fellow_____

Use this guide to focus your attention during the role-play house call. Read this sheet ahead of time in order to prepare yourself and take detailed notes during the visit.

C. **Notes**

Get in the Door / Asking Questions and Listening

- Introduces self in a clear concise manner: _____
- Moves past obstacles at door: _____
- Asks relevant fact based questions: _____
- Actively listens and engages worker in conversation: _____
- Asks follow up questions based on worker's answers: _____
- Kept conversation focused on worker's issues and work life: _____
- Moves from introduction to conversation quickly and smoothly _____

Vision of the Union / Inoculation

- Describes union clearly to someone who knows little about unions _____
- Explain in a clear and concise manner: _____
- Uses personal examples or relevant analogies in description: _____
- Describes union as workers united around an issues (does not 3rd party) _____
- Inoculates by address workers concerns about the union: _____
- Uses inoculation to educate about the union: _____
- Inoculated on two pre-determined concerns (i.e. Strikes and dues): _____

Assess & Agitation / Move to Action

- Agitated with a sense of urgency: _____
- Agitated using issues: _____
- Attempted to move worker to specific action: _____
- Moved worker to action based on worker's issues _____
- Addresses workers objections to action and moved past them: _____
- Created sense of urgency regarding action: _____
- Persisted in moving worker: _____

General Perceptions

- Good presence and rapport with worker _____
- Understand and follows house call agenda being taught _____
- Controls conversation using transition questions and asking questions _____
- Has inspiring or welcoming presence: _____

General Comments:

_____

_____

_____

_____

_____

_____

D. Teaching Fellow Guide for House calls

Organizer_____ Teaching Fellow_____

Use this guide to focus your attention during the role-play house call. Read this sheet ahead of time in order to prepare yourself and take detailed notes during the visit.

E. Notes

Get in the Door / Asking Questions and Listening

- Introduces self in a clear concise manner: _____
- Moves past obstacles at door: _____
- Asks relevant fact based questions: _____
- Actively listens and engages worker in conversation: _____
- Asks follow up questions based on worker's answers: _____
- Kept conversation focused on worker's issues and work life: _____
- Moves from introduction to conversation quickly and smoothly _____

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- Uses personal examples or relevant analogies in description: _____
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- Inoculates by address workers concerns about the union: _____
- Uses inoculation to educate about the union: _____
- Inoculated on two pre-determined concerns (i.e. Strikes and dues): _____

Assess & Agitation / Move to Action

- Agitated with a sense of urgency: _____
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- Created sense of urgency regarding action: _____
- Persisted in moving worker: _____

General Perceptions

- Good presence and rapport with worker _____
- Understand and follows house call agenda being taught _____
- Controls conversation using transition questions and asking questions _____
- Has inspiring or welcoming presence: _____

General Comments:

MARION INDUSTRIES OVERVIEW

Product: Auto parts supplies ranging from steering wheels, air bags, tire covers, consoles, arm rests, and other automotive soft trim products.

Customers: Supplies parts mainly the "Big Three": Ford, General Motors, and Chrysler.

Plant History: Marion Industries is a Dayton Ohio-based company that was started in 1979 by Joe Marian who died in 2000. Joe was a Dayton native who formed the company as a way to give back to the Dayton community where he was born and raised. Not only did he provide wages that were slightly better to the area but also provided extr benefits such as scholarships to children of employees. After his death, his daughters Robin and Pam took over the company.

Operations: There are a total of nine facilities at Marion Industries. Most have similar departments such as Sewing (for leather and air bags) Assembly (for door panels and arm rests), Glue, Foam Dept, Cutting, and Shipping/Receiving

Employees: A majority of the workforce are men, 40% are African American, 30% are women. There are approximately 1200 employees in the Dayton area plants.

Union History: The UAW attempted to organize MI in 2001. An election was held where the union lost 2 to 1. The Marion sisters asked for a second chance, stating that Jo would never want a union to come between his company and the employees. An overall increase of $1 in wages was also given.

INFORMATION FOR THE BLITZ THIS WEEKEND

UAW organizers have kept in contact with key leaders from the previous campaign. These leaders have said that workers are dissatisfied and once again interested in forming a union. Since the last campaign, MI purchased three joint ventures, increasing its number of employees by 300. Annual sales have increased to $180 million. Although things have gotten better for owners of MI, the promises that the Marion sisters made after the last union drive were not met. This week we will blitz the North Dayton plant. There are 400 workers in this plant.

ISSUES:

- No across the board increase in wages since 1995
- Christmas bonus was cut by 50% last year and rumor has it that there may not be any bonus this Christmas due to cost of buying the joint ventures.
- Increase in work injuries, especially carpal tunnel.
- Treatment-more pressure by line leaders to make production, favoritism

Inoculation: Every worker should be asked if they have any concerns about the union, and those concerns should be addressed. All workers should be inoculated on the issue of strikes.

Rating System: The UAW has a rating system in order to assess the level of union support a worker has. We will be using this rating system on the Blitz:

1: supports the union, on the organizing committee, takes action
2: supports union, has issues, signs a card
3: undecided about union, has concerns about the union and may have fear
4: not in favor of forming a union

GOALS FOR THE BLITZ

The organizers have obtained the names and addresses for over 70% of the workforce. We will be visiting workers who signed cards in the last campaign, workers who have shown interest in forming a union but may not have voted in the last campaign, and identified leaders. The goal of the blitz is to sign a minimum of 40% the workforce on union authorization cards and recruit identified leaders to be on the committee, and have a mass meeting in one week.

The goals for the house calls are:

1. Get In the Door
2. Get the Story
3. Give a Vision of the Union
4. Inoculate (Strikes and Getting Fired)
5. Assess the Worker's Support
6. Move Worker to Action
7. Get workers rated 1 or 2 to sign a union authorization card
8. Get workers rated 1, 2 or 3 to commit to come to a meeting in one week.

CAMPAIGN SIMULATION - WRAP UP

PURPOSE: To wrap up the campaign simulations exercise and simulate the end of the day reporting in a blitz.

STRUCTURE: A TF takes reports from the teams on how the house calls went, still "in role". Write up on the chart how many visits were done, the ratings, the signatures, and number of people coming to the meeting. Discuss whether they thought the visits were effective at accomplishing the goals of the house call -- finding out issues, educating about the union and the company, moving the worker to action, identifying and recruiting leaders. End with a summary of results for the house calls and an upbeat report by a TF.

CAMPAIGN SIMULATION DEBRIEF

A. Debrief

1. Summary
    - •Report numbers
    - •Ask for stories, comments
    - •Report on inconsistencies in charting
    - •Emphasize importance of accurate assessments
2. Ask for challenges participants faced (call on those you're most trying to get to come out)
3. Point out common problems (ask TF's). Usually:
    - •Didn't push hard for commitment; got weak commitment or just a signature
    - •Talked too much
    - •Didn't inoculate
    - •Didn't agitate
4. Ask TF's to comment
    - •Have them look at chart and see how they were rated and was that accurate
    - •Did the organizer push them enough
    - •Could they have been moved and how
5. Raise again the importance and review basics:
    - •Workers are Union - no third party
    - •Preparing for employer's campaign
    - •Building a vision
    - •Getting a commitment for action

LEADERSHIP AND COMMITTEE BUILDING **Saturday 4:10 - 4:45**
TF:_____

PURPOSE: To give the participants a chance to think about and discuss leadership and committees. To tea the importance of a representative, diverse, and active committee. To prepare people for the Round Rob exercise which follows.

STRUCTURE: A discussion led by one TF for 45 minutes, using as many questions as possible to draw o participants. The other TF are in a staff meeting during this time. **NOTE:** Leave plenty of time to discu committee meetings on page two of outline, since participants will be running a meeting during the Rou Robin exercise.

OUTLINE

1. What is a leader?
- Has followers.
- Is respected and listened to by co-workers.
- Can move other workers to take action.

Question: Are all leaders in the workplace on the union committee?
Answer: No! There are leaders who are for the union, on the fence, and against the union.

We need to recruit leaders to be committee members.

2. How do we get leaders to make a commitment to the campaign?
- Explain that the workers are the union.
- Explain the union's strategy and what it will take to win.
- Ask them! Find out what their issues are and agitate!
- Educate them about what to expect (include inoculation).
- Listen! You need to listen in order to agitate/move a worker to action.

Question: what can you ask potential leaders in orders to recruit them?

- What are their issues?
- What are their fears?
- What are they willing to do to help build the union?
- What other commitments/constraints do they already have?

3. The boss's reaction:

Question: What can management or other workers say about the union committee in order to attack t campaign?

- The lazy workers want the union.
- The union is only for the...(men, whites, production workers, friends of, etc.)
- It's only a few people who want the union.
- The pro-union workers are crazy/pushers/radicals.
- Unions are exclusive (historically racist and sexist).

Question: what can management do to committee members in order to fight the union?

- Isolate, harass, and intimidate.
- Promote, make promises, favor.
- Discipline or fire.
- Attempt to distract or divide them with issues of race, gender, etc.

4. The size and make up of the committee:

Question: How can we build a committee that will pre-empt the boss's attacks?

- Workers with good records.
- DIVERSE! (gender, race, ethnicity, age, shift, job, clique)
- Large and willing to be public in their support (10 to 15% as a guideline).
- In touch with their co-workers, especially those that are undecided.

Here's how an active committee makes a difference in winning a campaign:

- The win rate is 10% where there is no active committee.
- The win rate is 27% if 5% of the workers are active on the committee.
- The win rate is 61% if 15% of the work force is active on the committee.

5. What does the committee do?

- Get information.
- Educate and inoculate workers.
- Participate in union activity (i.e., leafleting).
- Recruit others to participate in union activity (i.e., wear buttons).
- Public spokespeople for the campaign (i.e., press conferences, captive meetings).

Question: Are workers ready to do all these things when they are recruited to be on the committee?

- No! Committee people are usually developed over time with each assignment they are given.

Questions: Have you ever been to a meeting without a purpose or agenda or that went on too long? How did it make you feel? Did you want to go to more meetings of that organization?

Purpose—to move the campaign forward and build organization. Each meeting should have a purpose and end with committee taking assignments.
Preparation—the organizer should know in advance of each meeting what the outcome should be. The organizer must listen to committee members and adjust plan if necessary. By the end of meeting committee should own decisions on the next steps of campaign.

Agenda—meetings should be structured with an agenda and a time frame.

- A committee meeting should include the same elements as a one-on-one: listening, educating, and moving workers to action.

- A sample committee meeting agenda:

1. Introduction and review agenda.

2. What are committee meetings for and how do they work?

3. Update on what's happening in the campaign.
   -from the committee members (department reports or report back from events)
   -from the organizer
4. Education/Inoculation
   -pick specific issues to cover in each meeting
5. Propose next steps and move committee to action.
   -make sure to include discussion and get the committee invested in the plan -- otherwise they won't execute it!
6. Give assignments and schedule next meeting.

Question: Is the committee a democracy? Do workers vote on strategy questions?

- Organizer's job is to make sure committee owns the decisions and has clear assignments that they will follow through on.
- Organizer should lead on decisions of strategy and tactics based on knowledge of what has worked elsewhere.

ROUND ROBIN MEETING **Saturday 4:45 - 6:00**
ROLE PLAY - ALL TEACHING FELLOWS

PURPOSE: To give participants a shot at running a committee meeting. To evaluate the participants' ability to lead a committee meeting and build consensus around an action plan.

STRUCTURE:

- The Outline & Background portions of this document should be read to the entire group and then the group is broken into groups of 8-12, with two TFs joining each group.

- In the groups, one TF will take the responsibility to prep the person running the meeting; the other TF will prep the participants playing the committee.

- It is important to give the participant playing the organizer sufficient time to prepare to run the meeting. Thus, after the first meeting, when the "organizer" and the "committee" are prepped simultaneously, the "organizer" should be pulled out to be prepped during the meeting before his/her meeting. This will give the person sufficient time to prepare.

Prep of the "organizer": Read the general situation and the organizer's concerns from the teaching fellow's guide. Briefly discuss the situation and explain any terms/situation he/she does not understand. Tell the person what the three-piece agenda for the meeting should be. Ask if the participant has any questions. Then leave the person alone to prepare themselves and go back to observe the meeting going on.

Prep of the committee: Read the general situation and the committee concerns from the TF guide. Assign specific people to play specific roles during the meeting, as indicated in the TF guide. Also, warn he participants to act like non-union workers, not to be so critical or too enthusiastic about the union, unless specifically indicated to do so.

ROUND ROBIN Committee Meeting: 300 person North Dayton Plant of Marion Industries

Shift breakdown:

JOB TITLE	*SHIFT 1*	*SHIFT 2*
Sewing	60	28
Assembly	40	22
Glue	30	13
Foam	20	17
Cutting	35	15
S & R	15	5
TOTALS	200	100

Background:

After a weekend Blitz, more than half of the workforce of the North Dayton plant was visited. Workers talk about problems they were having at the plant such as work injuries, low pay and little respect on the jo Workers who were ready to make change signed Union Authorization cards and were invited to attend a gener meeting that Sunday night. One hundred people attended the first public meeting.

At this meeting, the initial goals of the campaign were set:

- Sign up at least 65% of the workforce on Union Authorization Cards
- Create an Organizing committee of at least 60 workers representing all depts./shifts.

Those who have signed up to be a part of the Organizing Committee are invited to a committee meeting tl following day after work.

You are now about to start your first meeting of the newly expanded organizing committee. After logging in tl cards the committee members bring to the meeting, you calculate that about 30% of the workforce have no signed cards.

MEETING 1

TF Note: Pick a strong participant for the first meeting so that he/she can lay out a good agenda and set the stage for the rest of the exercise.

Everyone is still excited from yesterday's mass meeting. They are very pro-union in the meeting but pretty close-mouthed in the plant. They have still not "broken the fear". Some took cards at the meeting and passed them out secretly in the bathrooms and before and after work. Today, just a few people returned a few cards; others told you they are "working on" everyone they know. The committee needs to get moving inside and outside the plant and sign up for specific tasks. 90 workers have signed union cards (30%), the goal is 65%. (195 cards).

Organizer's dilemma: To get the campaign moving you need to get the committee to (a) take specific card assignments inside the plant and (b) take assignments to come house calling with your organizers. You want to build a majority ASAP before management's campaign starts full-force.

Agenda for meeting:

A) Congratulations on a great start to the campaign (pump up)
B) We need to start house calling (explain why) and taking assignments for cards (explain why)
C) Explain why management will try to keep the union out and how they will fight.

Committee concerns: The committee wants the union but would like to do it in a relatively quiet way. They will understand the need to take assignments and will take them if the organizer explains them in a cogent way. They are scared of management's reaction. However, this is a committee on a Monday following a successful blitz, overall they are loud and enthusiastic.

Specific Committee Assignments:

One person who says: "We shouldn't house call-we will annoy people and push them away from the union."
One person who asks: "What happens if we get fired?"
A couple of people saying that a lot of workers want a union. Are anxious to get things started.

Participant (Organizer): _____

Comments: _____

Teaching Point: *The organizer must convey a sense of urgency. The Committee has to take responsibility for organizing their co-workers from the beginning, understanding what it will take to win and how the employer will fight back.*

MEETING 2

TF Note: Pick someone that is "on the bubble" for this exercise. Will test one's ability to move peop into action.

After ten committee members helped with house calls and several others signed people at work, **they have no reached 66% (198 workers) signed and are ready to file for an election.** The cards and committee a strong in most areas, but weakest on second shift and in the glue and foam departments. An anti-committee h been formed. The pro-committee has not acted collectively or publicly to show their strength in the face management opposition.

Organizer's dilemma: (A) You want the committee to challenge management by going as a group to the H office and demanding recognition at the shift change tomorrow. If management won't recognize the union, tl group will leave from there and go to the NLRB to file for an election. (B) You are worried about the an committee. It is strong in Glue and Foam. (Almost none of your committee knows this because you only ha one in the Glue and Foam Departments.) (C) As a result of these events, it is very important to do somethi public so that the rest of the workforce knows that THE WORKERS want the union!

Meeting agenda:

A) Congrats on getting enough cards to file (pump up)
B) It is time to bring the fight out in the open. We will plan a delegation to the HR department to dema that they recognize the union. This will show everyone that the workers are serious about forming union.
C) The anti-committee-don't get provoked by the anti-committee. They are a tool of management. They want to create tension. Don't engage them. Just ignore them.

Committee concerns: The committee is excited about filing for an election. Most committee members thi that those who didn't sign are just thinking about it and will probably sign once we file. Some of the committ is worried about the anti-committee, and some of the committee feels the anti's are just a small group that wo be effective. However, overall the committee is still enthusiastic.

Committee assignments:

One person should question why we should do the delegation.... what if we are written up?
Two people should be excited about it and are ready to do it.
One person from the Glue department to complain about being harassed by the anti-union committee.
One person threatened an anti ("If you don't shut up I am going to kick your ass!!) in the break room today a wants to talk about it. Thinks the anti committee is a joke.

Participant (Organizer): _____

Comments: _____

***Teaching Point**: Demanding recognition from the employer is a way for the committee to stand up publicly f the union. Other workers in the workplace will move beyond their own fear if they see committee membe taking public action.*

MEETING 3

TF NOTE: Another good exercise for someone who needs to show that they can inoculate and move to action.

One week later: The **action at the HR office was a success. The committee felt the power**: sixty workers joined the action. A petition for an election has been filed. The company has begun to crank up its' anti-union message. Marion posted a list of UAW shops that have closed in Ohio. (There are many shops on the list). Overall, the campaign is going well. However, in some areas people are beginning to have doubts.

Organizer's dilemma:

You have found out through your dealings with the labor board the company has hired **Fitzsimons and Naranjo,** a renowned union busting law firm out of Ypsilanti, Michigan. This concerns you because they run real scorched earth campaigns. You need to get the committee ready for a real fight. You also need to keep the committee moving-you want to get people to ask questions to disrupt the next captive audience meeting. You know that if Naranjo and Fitzsimons runs the meetings unhindered it will be a big problem.

Meeting agenda:

A) Congrats on the action last week. (Pump up)
B) The union busters are coming...beware...specific inoculation on plant closings.
C) We need to ask questions in the captives...what are good questions to ask and who will ask them.

Committee concerns: Most of the committee do not feel there is any reason to be concerned; they think things are fine. Some people are starting to worry about the plant closing down. The committee overall is a little overoptimistic.

Committee assignments:

One person who tells the group s/he heard a rumor that the plant is moving to Mexico.
Three people who agree to ask questions in the captive.
Two people who suggest questions (How much are you paying the union buster and How much profit did you make last year)

Participant (Organizer):_____

Comments:_____

***Teaching Point**: Management often hires "union busters" to fight the workers' campaign, put the union on the defensive and intimidate the workers. The organizer and committee need a plan that includes heavy inoculation of the workers and positive messages about the union and worker issues.*

MEETING 4

TF NOTE: Get a participant who needs to show decisiveness to do this meeting. Tests the ability present a plan that will greatly affect the campaign's success.

In the first meetings that the company held, about half of the committee did ask some questions but the meeti was pretty "soft": just letting the workers know about their right to vote. **The election date has been set f eight weeks from now.**

Top management and the Marion sisters toured the plant today. They were very friendly, talked with people the floor, and made it a point to meet every committee member. In paychecks today, workers got an invitati to a between-shift free lunch hosted by the Marion's that will take place in three days. The discussion duri the tour also centered on Big 3 contracts and hints that raises are coming.

Organizer's dilemma: This lunch is a big problem. You have already heard that it is dividing the committe Some insist on going, some want to boycott. A boycott will not be successful. Many workers will go just to g the free food. You want the committee to plan an action that will unify workers and not turn off the undecid voters.

Meeting agenda:

A) An election date has been set.... congrats
B) Discussion of the luncheon (what do you think). Suggestion for action: we go and all wear UAW shirts. We form a big line and introduce ourselves to the Marion sisters and explain why we are formi a union.
C) Further inoculation: Management will bribe as well as threaten.

Committee concerns: The committee is confused about how they feel and don't know what to do. Some a angry and want to boycott the lunch. Others think it's no big deal and we should just chill out or we'll tu people off; and others think everyone was impressed, even card-signers. If the organizer suggests a dece compromise we will agree. Overall, the committee is still positive.

Committee assignments:

Three people who want to, in loud voices, boycott the lunch.
Three people who insist that we have to go to the lunch or we will look stupid.

Participant (Organizer): _____
Comments: _____

Teaching Point: *Management alternates between scaring workers and trying to buy them off or asking f another chance. When the employer is playing the "nice guy" the organizer needs to keep workers focused the issues that caused workers to begin a union campaign. However the committee responds to manageme tactics, they must be united and they must consider the impact on the undecided workers.*

MEETING 5

TF NOTE: This is a tough meeting that may be assigned to someone who needs to be challenged a bit more.

The Committee action at the Marion Sisters' luncheon was well received by undecided workers. One of the committee members was able to ask the sisters several questions regarding safety and increased line speed. They said they were unprepared to address their concerns.

Management had their first nasty, threatening captive audience meeting. It was extremely effective. They emphasized Marion Industries staying competitive, the movement of other companies overseas, and said management was doing their best to protect workers interests. They highlighted negative union stories, such as union dues, the number of strikes the union had and permanent replacement of workers during strikes. A video showed violent strikes and asked questions about what would happen if the plant had to close down. They gave out a flyer challenging the union to guarantee improvements and rights. The committee wants to do a flyer to respond.

Organizer's dilemma: The committee is scared and you want to make sure they have the confidence and the right information to communicate with their co-workers effectively. You know a leaflet responding to the captive is way to defensive and is exactly what Naranjo and Fitzsimons wants you to do. You want to suggest a survey of the workforce on what changes they want to see in their first contract in order to re-focus the committee and the workers on the issues.

Meeting agenda:

A) Congrats on the action last week.
B) Discussion of captive-I warned you and this is what the campaign will look like.
C) Survey to get people focused back on their issues.

Committee concerns: The captive has freaked out the committee. They are silent when the organizer comes in the room. They want to do a leaflet to answer all the lies told by management in the meeting. However, they still want the union, they need to be reassured.

Committee assignments: One **person** to say that s/he counted 187 lies in the captive and wants to do a leaflet about it. Most people agree.

Participant (Organizer)_____

Comments: _____

***Teaching Point**: Management uses fear to derail the campaign. They are constantly assessing every worker to find their weak spots and turn them against the union. The organizer must show leadership to the committee, reassure and inspire them, and keep them focused on the union's plan. The organizer must make sure the union doesn't just react or become defensive, but continues to focus on one-on-ones and the real issues of the campaign.*

MEETING 6

The union contract survey helped to stop the company's momentum following their first really nasty captive.

You just got the Excelsior list, which is a list of names and addresses of all employees the company clain are eligible to vote in the election:

There are about 30 new names - mostly new hires that started about two months ago. The company is givi raises and perks to new hires to win votes in areas where the union is weak. There is a real drop off attendance at committee meetings since the captive audiences began.

Organizer's dilemma: Your numbers show that you could lose if you do not contact all the 30 new worker You are really concerned about divisions that are developing in the committee. This election is going to close. You really need to focus on the undecided people in the middle and not allow the committee to rip its apart.

Agenda for meeting:

A) Congrats on survey action (pump-up)
B) Explanation of what the Excelsior List is.
C) Getting people focused on house calling and setting up a schedule.

Committee concerns: The committee members are not worried about the new hires, they're worried about t committee members who aren't active. Some think the new hires don't care or won't vote, and still others thi that momentum is pro-union, and that new hires feel it and will vote yes. No one wants to house call anymo They want to go and confront the other committee people who are not showing up.

Two people who are really mad about committee not showing up and want to go to their houses right now a yell at them.

Two people who say that people are tired of house calls and that house calls are turning them off.

Participant (Organizer)_____

Comments: _____

Teaching Point: *It's important that the committee understands that every vote counts in an election. Rig now the workforce is beginning to polarize: those who support, those who don't, and those in the middle. If w don't get to those on the Excelsior, the bosses will. The organizer needs to convey this to the committe*

MEETING 7

TF NOTES: Tough meeting. Don't put someone up there who is weak.

Management has been increasingly harsh in its attacks on union supporters. Committee people have been openly harassed on the floor, written up for minor errors, and repeatedly called into one-on-one meetings with the supervisors. Management has been relentless in pursuing a tight captive schedule.

Two workers have been fired for "excessive lateness", but it is clear these were union related.

The campaign is going to be close. Everybody in the plant is very, very tense. Everything is coming down to the last two weeks.

Organizer's dilemma: The campaign could be lost if the committee loses focus on the undecided votes in the middle. They must keep their anger focused on Management. You have filed charges with the NLRB on the firings. It is vital that workers understand that the quickest way to get the fired workers back is to win the election. **Most important is to focus the committee on continued one-on-ones with their co-workers, especially those whose support has not been strong.**

Meeting Agenda

A) Pump-up about the election being only two weeks away-you have come so far
B) What we are doing about the firings-we have filed charges but the fastest way we will get these people back is to win the election-we must stay focused.
C) Go over the list of undecided voters and assign people to talk to them

Committee concerns: The committee is very nervous. They still want the union. They are a little shocked that the company would act this badly. They are especially mad at the firings-the two people who were fired were very well respected.

Committee Assignments:

Two people who were fired-they sit there silently and scowl.
Two friends of the fired workers-they are very loud about demanding the organizer get the fired workers back now.
Three people who will take assignments to talk to their co-workers.

Participant (Organizer): _____

Comments: _____

***Teaching Point**: These times are turning points. The organizer must have a plan and help the committee implement it when the employer launches vicious attacks against the workers and leaders. The fastest way for pro-union workers who are unfairly fired during an organizing drive to get their jobs back is for the workers to win the union and make rehiring the fired workers a demand in bargaining.*

MEETING 8

TF NOTE: Good meeting for people who haven't had a chance to go. Fairly easy.

One week before the election. The committee did a really good job talking with the undecided worke Charges have been filed with the NLRB on behalf of the two-fired workers, and they both have good cas This election is going to be really close. The committee needs to keep focused on building momentum for t election. The company has continued to really hit the workers hard.

Organizer's dilemma: You want the committee to ask everyone to sign a "We're Voting Yes" petition that w be handed out to everyone the day before the election. In order to be effective, a majority of workers must si the petition. The reason why we are doing the petition is to try and pull some of the undecided-to convince the to come to the union-the winning side. A plan is needed for one-on-one's with all the confirmed uni supporters and undecided workers to get the petition signed.

Meeting agenda
A) This is what we have been fighting for-the election is one week away-we are one week away from victory.
B) We are going to do this petition-explain why.
C) Who can work to get the petition done-who can take assignments.

TF should have the organizer give out the "We're Voting Yes" petition to the group.

Committee concerns: The committee is wired and exhausted. They have withstood a vicious compa campaign and really, really want to win. They are a little skeptical that people will sign the petition. T organizer has won back their confidence, however.

Committee assignments:

Two people to get into an argument about the petition-one thinks it is a good idea and one thinks it is stupid.

People will take assignments if the organizer explains the petition well.

Participant (Organizer): _____

Comments: _____

***Teaching Point**: Secret support doesn't win elections or build strong unions. It is essential that the organiz continue emphasizing a strong majority of committed yes votes is the only way to win. Every worker coun Undecided workers end up no votes if they aren't moved to commit.*

WE ARE STANDING TOGETHER FOR CHANGE

WE ARE VOTING YES!

SECOND HOUSE CALL: FOUR SEASON CARE VILLAGE ROLE PLAY **Saturday 7:15 - 8:40**

PURPOSE: To give the participants the opportunity to do a second house call at the beginning of another campaign at a nursing home.

OUTLINE:

1. Briefing on Four Seasons Care Village
2. Review of house call agenda and goals of the visit.
3. Break into teams
4. Visit teaching fellow/fill out house call sheet and get feedback immediately after HC
5. Return to dispatch room and send out second team
6. Second team returns from house call and debriefs
7. When the first team returns from debrief the second team goes for debrief
8. Return for group debrief

Four Seasons Care Village – Overview

Type of Facility: long term nursing care facility, providing 24-hour medical care and living assistance to elderly residents.

Residents: Residents are people unable to live without regular assistance with eating, bathing, and other personal care needs. Some residents suffer from Alzheimer's disease, dementia, and depression.

Corporate History: Four Seasons Care Village (FSCV) was established on the east side of Columbus, Ohio in 1973 as a not-for-profit charity of the Sisters of the Immaculate Conception. The nuns lived on the campus of FSCV, managed the nursing home, and gave some direct care. Currently, FSCV is owned and operated as part of Total Care, a Cincinnati-based corporation that bought FSCV in 1992 and operates long term care facilities in Indiana, Kentucky, and Ohio.

Services: There are 4 residential nursing units at FSCV, with 1 reserved for Alzheimer's patients. The Restorative Department provides basic physical therapy services. The Activities Department organizes recreational events (games, holidays, religious services, etc.) In addition, there is a dietary department, housekeeping service, laundry service, and maintenance department.

Employees: A majority of the workforce are women. About half of the workers come from the east side Black community. Some 30% of the employees are white, descendants of Appalachian economic migrants of the 1940s and '50s. They live on the east and south side of Columbus. In the past 5 years, the African immigrant community has expanded rapidly. At FSCV, 20% of the workers are African. Altogether, there are 110 workers at FSCV.

Union History: The Service Employees International Union (SEIU) ran a campaign in 2000. Walden Woods, which had just acquired the home, fought hard with early captive audience meetings and one on one sessions with veteran workers. SEIU did not get sufficient worker support to file for a Labor Board election.

Information for the Blitz

Geraldine Bello, an active SEIU member from the recently organized Nelson Park Nursing Home in Columbus has taken a part time job at FSCV. She wants to organize her new workplace with her union and has put together a list of FSCV workers. Since acquiring the home in 2000, Total Care management has implemented unpopular changes:

- A new evaluation system that has kept raises low
- A "bank" of Paid Time Off (PTO) that deducts sick days from vacation time
- A cut in shift differentials and elimination of the Christmas Bonus
- A new insurance policy that is unaffordable for many workers

Other problems include:

- Chronic short staffing on the nursing floors that means overwork for employees and limited care time for residents.
- Shortage of supplies that makes work difficult for employees
- A high rate of employees "calling off" and a high turnover rate

SEIU represents over 100 nursing homes in Ohio but only 2 in Columbus, where nursing home operators have beat back organizing drives and decertified 1 union facility. SEIU represents 3 other Total Care nursing homes in Ohio.

GOALS FOR THE BLITZ

The organizers have taken the list that Geraldine Bello compiled and built the list to include the names and addresses of about 60% of the total workforce at FSCV. The goal of the blitz is to sign a minimum of 40% of the workforce on union authorization cards, get more names and addresses of workers and have a mass meeting in one week.

The goals for the house calls are:

1. Get In the Door
2. Get the Story
3. Give a Vision of the Union
4. Inoculate (Strikes and Getting Fired)
5. Assess the Worker's Support
6. Move Worker to Action
7. Get workers rated 1 or 2 to sign a union authorization card
8. Get workers rated 1, 2 or 3 to commit to come to a meeting in one week.
9. Get the names and addresses of other workers to visit.

F. Teaching Fellow Guide for House calls

Organizer_____ Teaching Fellow_____

Use this guide to focus your attention during the role-play house call. Read this sheet ahead of time in order prepare yourself and take detailed notes during the visit.

G. **Notes**

Get in the Door / Asking Questions and Listening

- Introduces self in a clear concise manner: _____
- Moves past obstacles at door: _____
- Asks relevant fact based questions: _____
- Actively listens and engages worker in conversation: _____
- Asks follow up questions based on worker's answers: _____
- Kept conversation focused on worker's issues and work life: _____
- Moves from introduction to conversation quickly and smoothly _____

Vision of the Union / Inoculation

- Describes union clearly to someone who knows little about unions _____
- Explain in a clear and concise manner: _____
- Uses personal examples or relevant analogies in description: _____
- Describes union as workers united around an issues (does not 3rd party) _____
- Inoculates by address workers concerns about the union: _____
- Uses inoculation to educate about the union: _____
- Inoculated on two pre-determined concerns (i.e. Strikes and dues): _____

Assess & Agitation / Move to Action

- Agitated with a sense of urgency: _____
- Agitated using issues: _____
- Attempted to move worker to specific action: _____
- Moved worker to action based on worker's issues _____
- Addresses workers objections to action and moved past them: _____
- Created sense of urgency regarding action: _____
- Persisted in moving worker: _____

General Perceptions

- Good presence and rapport with worker _____
- Understand and follows house call agenda being taught _____
- Controls conversation using transition questions and asking questions _____
- Has inspiring or welcoming presence: _____

General Comments:

_____

_____

_____

_____

_____

H. Teaching Fellow Guide for House calls

Organizer_____ Teaching Fellow_____

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- Has inspiring or welcoming presence: _____

General Comments:

_____

_____

_____

_____

_____

_____

CAMPAIGN SIMULATION - WRAP UP 8:40 - 9:00

PURPOSE: To wrap up the campaign simulations exercise and simulate the end of the day reporting in a blitz

STRUCTURE: A TF takes reports from the teams on how the house calls went, still "in role". Write up e the chart how many visits were done, the ratings, the signatures, and number of people coming to the meetin Discuss whether they thought the visits were effective at accomplishing the goals of the house call -- finding o issues, educating about the union and the company, moving the worker to action, identifying and recruitir leaders. End with a summary of results for the house calls and an upbeat report by a TF.

CAMPAIGN SIMULATION DEBRIEF

B. Debrief

6. Summary
    - •Report numbers
    - •Ask for stories, comments
    - •Report on inconsistencies in charting
    - •Emphasize importance of accurate assessments
7. Ask for challenges participants faced (call on those you're most trying to get to come out)
8. Point out common problems (ask TF's). Usually:
    - •Didn't push hard for commitment; got weak commitment or just a signature
    - •Talked too much
    - •Didn't inoculate
    - •Didn't agitate
9. Ask TF's to comment
    - •Have them look at chart and see how they were rated and was that accurate
    - •Did the organizer push them enough
    - •Could they have been moved and how
10. Raise again the importance and review basics:
    - •Workers are Union - no third party
    - •Preparing for employer's campaign
    - •Building a vision
    - •Getting a commitment for action

B. Review campaign victory

Panel Discussion and Closing **SUNDAY 9:00**

Purpose: To give the participants a chance to ask the TF(s) any questions they might have about the job, the lifestyle, the labor movement, etc. Also to focus on the importance of salting and member organizers by TF's relating their experiences of how salts and members organizers have contributed to campaigns. TF's should volunteer beforehand to OI Staff if they have salting and/or member organizer programs they've worked with that have been successful and how. The TF moderator should change the topic at the designated times.

Structure: All the TF's from unions sit at the front of the room. One TF on the panel should moderate by calling on participants and directing the questions. TF's should keep their answers brief. TF should keep tone positive, keep intra-union conflicts to a minimum, and should be conscious of sharing the limelight with the other TF's. TF's should respond to the following if they aren't raised by the participant:

9:00-10:00 **TF Panel responds to questions from participants**
(TF Moderator, as part of the panel, should make sure the following points are also covered by the TFs)
-What experiences have been important to keep you organizing? If you are a woman or person of color, what in particular have you experienced that has kept you organizing full-time?
-What campaigns have you learned from the most?
-What advice do you have for young or new organizers?

10-10:15 **TF's Focus on Salting Experiences/Programs:**
(TF(s) with experience using salts talk about their program, or OI lead talks about salting programs with TF or participant stories.)
- What is salting?
- How have salts contributed to campaigns?
- Why should a person salt?

10:15-10:30 **TF's Focus on Member Organizing Committees:**
- How have MO's contributed to organizing successes?
- Continued involvement, recruitment and training
- Expanding MO committees in locals

10:30-11:00 **Participants fill out written evaluations and recruitment surveys**

11:00 **Final Comments by all Participants**

11:45 **Graduation, diplomas***

11:55 **Final closing, chants, songs.....**

NOTE: If each participant announces the next graduate and gives them their diploma, they can also give their closing comment at that time as well as make a comment about the person they are graduating.

*Guidelines for having participants give out diplomas:

Summary - OI staff or a TF announces the graduation and gives the diplomas to the 1st person on the sta with the following instructions:

1. Each person makes a short final comment about the weekend.
2. The person them makes a short comment about the person whose diploma is on top and gives it to the as well as the rest of the stack.
3. The person who received their diploma then repeats the process, commenting briefly on the weekend a the next person, etc.

If the participants have been divided in two groups, divide the diplomas by the groups and have each gro alternate using the above guideline.

Note to OI staff: Don't forget to collect written evaluations and recruitment surveys.

STAFF MEETING NOTES

NAME	LISTENING EXERCISE	FRI ROLE PLAYS	CAPTIVE	SAT ROLE PLAYS	1ST HOUSE CALL	ROUND ROBIN	2ND HOUSE CALL	R

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